Historic, archived document

Do not assume content reflects current scientific knowledge, policies, or practices.

Reserve
81.9
6 Fm

WORLD BEEF TRENDS

U.S. DEPT. OF AGRICULTURE
NATIONAL AGRICULTURAL LIBRARY

JUL 8 - 1966

CURRENT SERIAL RECORDS

Foreign Agricultural Service, U.S. Department of Agriculture

FAS-M-173
June 1966

Glossary - -Terminology and concepts employed in the individual country tables are described as follows:

Total cattle and calves on farms--estimates as of the beginning of year unless otherwise stated. Buffaloes included where appropriate.

Imports and exports of live cattle and calves--expressed separately in terms both of number of head and of carcass weight equivalents. These data represent animals traded for slaughter and for feeding purposes. They do not include those imported or exported for breeding purposes.

Total slaughter of cattle and calves--comprised of both commercial and farm slaughter of all cattle and calves including those imported.

Beef and veal production.. from the total slaughter of both home-grown and imported cattle and calves; excludes offals and exported live animals.

Gross domestic output--represents beef and veal from "home-grown cattle" (i.e., excluding the carcass weight equivalent of imported live cattle and calves) plus the beef and veal equivalent of exported live cattle and calves. Where trade in live animals is non-existent "gross domestic output" would equal "beef and veal production". In contrast, where live animal imports are substantial the "gross domestic output" would be proportionately lower than "beef and veal production". Similarly, where live animal exports are substantial, "gross domestic output" would be proportionately larger than "beef and veal production".

Total imports and exports--the sum of imports or exports of fresh, chilled, frozen, canned, and preserved beef and veal plus the beef and veal equivalent of imported or exported live cattle and calves in terms of carcass weight equivalent.

Total consumption--the sum of "gross domestic output" plus or minus net trade including the carcass weight equivalent of live animals. It may also be calculated as the sum of "beef and veal production" plus or minus net trade in beef and veal only in the form of fresh, chilled, frozen, canned and preserved meat (i.e. excluding the carcass weight equivalent of live animals traded).

Carcass Weight Equivalent (CWE)--basis for expressing all meat data included in this report. It refers to the bone-in equivalent of dressed carcass meat less the offals. Conversion factors used for the various forms of meat either were those suggested by individual countries or were estimated, on a basis of general knowledge of the products. In some cases, U.S. conversion factors were used. Live animals were converted at the average weight at which they entered or left a country.

Beef--as used throughout most of the text, is broadly applied so as to include veal.

FOREWORD

World trade in beef and veal has grown substantially in recent years, and during 1964 and 1965 it changed considerably. In the trade, the United States has a vital interest, as the world's foremost producer of beef and veal (nearly one-third of the world total in each of the last two years); as the leading importer in 1962, 1963, and again in 1965, and as an exporter, as well.

Year-to-year changes in the world trade picture are almost always significant and sometimes dramatic. Increasing production spurred by ever-growing demand is influenced by unexpected fluctuations in the weather. Prices vary and trade patterns shift in the process. Supplies do not always match demand.

It is because of these fast-moving developments and changes that this Division has undertaken to describe and evaluate the setting for the current beef situation. Hereafter, a series of similar reports will be prepared on a periodic basis, updating and highlighting the latest changes and developments in the world beef situation.

The purpose of this first-time publication is twofold: first, to serve as a statistical reference and recording of significant developments in the international beef picture and second, to provide a basis upon which forecasters and policymakers can agree or disagree in plotting the course ahead.

James P. Hartman

James P. Hartman, Director
Livestock and Meat Products Division

CONTENTS

	Page
SUMMARY	1
Production, 1964-65	2
Consumption, 1964-65	2
Prices, 1964-65	3
International Trade, 1964-65	4
NORTH AMERICA:	
Canada	9
Mexico	11
United States	12
SOUTH AMERICA:	
Argentina	16
Brazil	18
Chile	18
Peru	19
Uruguay	20
WESTERN EUROPE:	
Denmark	21
European Economic Community (EEC)	23
Belgium/Luxembourg	24
France	25
Germany, Federal Republic of	26
Italy	28
Netherlands	29
Greece	30
Ireland	32
Spain	33
Switzerland	34
United Kingdom	35
EASTERN EUROPE:	
Poland	36
Yugoslavia	37
USSR	38
OCEANIA:	
Australia	39
New Zealand	40

WORLD BEEF TRENDS

by Robert H. Wuhrman
Livestock and Meat Products Division

SUMMARY

More beef is produced and consumed than any other meat. Worldwide, beef has comprised around 53 percent of total red meat production in recent years, in the United States, roughly 60 percent; and in both instances, pork has followed with about 38 percent of total red meat output.

Beef's relative popularity from region to region around the world is influenced by tradition as well as by various economic factors such as product availability, comparative prices and the consumer income with which to buy. Local customs and even religion play an important role in beef consumption habits.

Annual per capita beef consumption is highest in Argentina (153-190 pounds in recent years), Uruguay (146-181), Paraguay (104-114), United States (94-107), Australia (85-108), and New Zealand (94-123). Each of these major beef-eating countries is characterized by extensive areas of grazing land and climatic factors conducive to the development of vast cattle industries. All but the United States are substantial net exporters of beef.

Demand for beef has been spurred by larger incomes and higher living levels associated with economic growth in the industralized areas of the world. In Western Europe especially, postwar redevelopment and rapid economic growth have caused per capita beef consumption to increase steadily in most countries there since the mid-1950's. Demand increases have outpaced domestic production of beef in that area. Much larger imports have been necessary to satisfy total requirements.

International trade in beef has been strongly stimulated in the process. Total exports of 46 major trading countries increased from 3.3 billion pounds yearly during the average 1956-60 period to 4.6 billion pounds in 1964. These levels represent 6.5 percent and 7.6 percent of world beef production in those same years.

Argentina is the world's leading beef exporter. However, its share of the 46-country total decreased from 37 percent for the 1956-60 average to 26 percent in 1964. Australia--second largest exporter -- increased its share of the world total from 17 percent in 1956-60 to 22 percent in 1964. Third and fourth most important beef exporters were New Zealand and Uruguay, with 8 and 7 percent shares, respectively, of the 1964 world total.

On the import side, the United States -- world's leading beef producer with a third of the global total in recent years -- and the United Kingdom have shifted between first and second place

positions over the past 5 years. Together, they claim over 50 percent of total world beef imports. In 1964, Italy's fast increasing imports moved the country into a solid third-place position with a 14 percent share, trailed by West Germany with 7 percent.

Shifting trade patterns have been a direct result of variations and trends in production, consumption and prices.

PRODUCTION, 1964-65

In 1964, total beef and veal output in 44 major producing countries was estimated at 60.3 billion pounds -- 20 percent above the 1956-60 average level but only 2 percent above that of 1963. A big 2.1-billion-pound increase over the 1963 level in the United States -- world's largest producer -- was partly offset by substantial declines in South America and Western Europe. Slight increases were recorded in Canada, Oceania, USSR, and certain other individual countries.

In 1965, preliminary estimates indicated only a moderate increase of 1 percent compared with the previous year's overall output level. Slightly increased production levels were recorded by the United States, Canada, Argentina, Australia, some Western European countries while decreases were registered in New Zealand, United Kingdom, and various other European and South American countries. On a regional basis, 1965 beef production was off moderately in South America and in Western Europe; it was up in North America and Oceania.

Herd rebuilding following heavy 1963 slaughterings (stimulated in part by local feed shortages in large areas of the world) has for the past two years had a limiting effect on beef and veal production. This situation has been especially obvious in Argentina and most West European countries. In the case of Australia, the drought-induced cutback occurred in 1965. Rebuilding and reduced slaughter is likely there, after drought conditions have subsided.

Virtually all government policies concerning livestock are aimed at expanding domestic cattle and beef industries. Traditional importers wish to attain near self-sufficiency, thereby reducing heavy foreign exchange drains. These countries -- especially the more industrialized -- are already experiencing difficulty in merely keeping pace with surging demand for beef and veal. Traditional exporters, on the other hand, wish to maintain their dominance in the world beef trade, thereby bolstering incoming foreign exchange.

Production trends evident in various parts of the world have influenced domestic consumption, and international trade patterns to a considerable extent. In turn, strengthened demand has stimulated production expansion, but to a much lesser degree. Numerous factors -- institutional, climatic, and others -- have inhibited growth of output in relation to rising consumption potential.

CONSUMPTION, 1964-65

Throughout the world, beef and veal consumption is influenced by consumers' preferences, product availability, relative prices, and the economic ability to purchase. The interplay of these forces in recent years has resulted in marked shifts in beef and veal consumption.

In industrialized Western Europe, rapid economic growth, larger incomes, and higher living levels have caused demand rises to outpace a temporarily lagging rise in domestic production. As a result, imports have risen steadily. For 1964 and 1965, however, tight supplies and high prices generally discouraged beef and veal consumption, while pork and poultry gained.

All countries of the European Economic Community (EEC), and many others of Western Europe, registered a moderate decline in per capita beef and veal consumption in 1964. (In Western Europe, this ranges from a low of less than 20 pounds consumed per person in Portugal and Spain to a high of 70 pounds in France.) Further declines for most countries in Europe were apparent in 1965. Nevertheless, current consumption levels in most European countries remain significantly higher than the 1956-60 averages.

In the United States, per capita consumption in 1964 reached a record high level of 107 pounds, then fell off by 1 pound in 1965. Canadian consumption reached a new high of 91 pounds per person in 1965.

A dramatic reduction took place in Argentina -- the world's leading beef-eating country--with consumption dropping from 190 pounds per person in 1963 to 153 pounds in 1964, then rising again to 173 pounds in 1965. In an effort to sustain exports, various measures -- including "meatless days" -- were taken by the Argentine Government to curb domestic consumption. Brazil, Chile, Peru, and other South American countries also experienced reduced consumption levels during the past two years. Smaller domestic production and strong world export demand are reflected.

Per capita consumption in Australia (108 pounds) and in New Zealand (104 pounds) -- both among the world's leading beef-eaters -- was up somewhat from 1963 levels, as a result of larger domestic availabilities.

On a continent basis, beef consumption is lowest in Asia where per capita intake is considerably under 10 pounds yearly. Pork, mutton, lamb, goatmeat or fish are more important sources of animal proteins there.

Shifting beef consumption patterns are closely related to price movements.

PRICES, 1964-65

Substantially higher beef prices prevailed throughout most of 1965 in the United States and Western Europe -- the world's two leading beef-importing regions. Reduced supplies and continued strong demand were chief causes.

Low prices that had characterized the U.S. cattle industry in 1963 showed signs of improvement by mid-1964. Except for a seasonal decline that fall and winter, U.S. beef prices continued upward during 1964. They remained strong throughout 1965 at a significantly higher level than in the previous year.

In Europe, supply shortages that became evident in late 1963 continued through 1965. Imports at that time were insufficient to fill requirement gaps caused by lagging production and surging demand. As a result, prices turned upward.

During 1964, domestically-produced carcass beef roughly comparable to U.S. grade Good was wholesaling at prices ranging from around 50¢ a pound in Rotterdam and Paris to over 65¢ a pound in Milan. Brussels and Hamburg prices varied within that range. These high price levels continued throughout most of 1965. Heavy seasonal slaughter resulted in price declines in most European markets in the latter months of 1965. Still, wholesale prices in these same markets were 50¢ - 60¢ a pound at year's end. In contrast, similar-quality U.S. beef, wholesaling in New York, was priced at 34¢-42¢ a pound during 1964 and 1965.

Imported Argentine beef wholesaling in the London market has consistently been lower-priced than similar-quality U.S. beef still in New York coolers.

The pattern of international trade in beef is determined more by such prevailing regional price differences than by any other single factor.

INTERNATIONAL TRADE, 1964-65

Significant changes occurred in the pattern of international beef trade during the past two years. These shifts are a direct result of the developments and trends in production, consumption, and prices reviewed above.

In early 1964, the world beef situation was ripe for shifts that had already begun taking place. In Western Europe -- principal beef importing region -- production was lagging. Demand was surging. Prices turned upward toward new postwar highs. Argentina -- world's leading beef exporter and Europe's traditional source of import supplies -- was experiencing from substantially reduced production and export availabilities resulting from the previous year's drought-induced extra-heavy slaughter. Prices advanced sharply.

At the same time (1964), the United States -- major beef importer -- was experiencing its largest output in history. Prices had been depressed since the previous year. Australia and New Zealand -- second and third largest beef exporters with a substantial outlet for manufacturing-type beef in the U.S. market -- were also experiencing record production and high-level export availabilities.

The simultaneous occurrence of these combined factors resulted in the inevitable. World beef trade patterns began to shift. Europe needed more beef. The United States needed less imported beef. Argentina tried her best to satisfy Europe's expanded appetite but couldn't quite fill the gap that still remained. Australia and New Zealand needed a new market; they found one -- and with better prices -- in Western Europe.

In 1964, Western Europe imported 2.6 billion pounds of beef and veal -- nearly 6 percent more than in the preceding year and a full 35 percent more than the average 1956-60 levels. Argentina's exports, on the other hand, amounted to 1.2 billion pounds -- 25 percent less than in 1963 and only about equal to the 1956-60 average. Shipments from Uruguay were up 50 percent from 1963; most of this 108-million-pound increase moved to Western Europe.

The United States imported 1.1 billion pounds of beef and veal in 1964 -- 35 percent less than 1963's peak imports but, still 62 percent more than the 1956-60 average.

Australia and New Zealand exported 1.4 billion pounds of beef and veal in 1964 -- about 4 percent more than in the preceding year but a full 60 percent more than the 1956-60 average. A substantial portion of Oceania's shipments was diverted from the United States to the beef-hungry markets of Western Europe to fill the gap left by inadequate imports from traditional suppliers.

The shifts that emerged in 1964 continued throughout 1965. World beef trade was off slightly though Western European import demand remained strong. Export availabilities were limited by reduced or substantially unchanged production in Europe and South America where herd rebuilding was still underway, and in Oceania where drought forced slaughtering at lighter average weights. Australia and New Zealand continued to move substantial quantities of beef to the attractive Western European markets. The United States -- setting another new high production record last year -- imported even less beef than in the previous year.

In 1965, Western Europe imported 2.5 billion pounds of beef -- only slightly less than in 1964 and the third consecutive year of high-level imports. And, for the second year in a row Argentine

Table 1.--BEEF AND VEAL[1]: Production in selected countries, average 1956-60, annual 1960-65

Continent and country	Average 1956-60	1960	1961	1962	1963	1964[2]	1965[2]
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
North America:							
Canada	1,343.0	1,387.0	1,426.4	1,418.0	1,539.6	1,693.4	1,834.0
United States	15,357.0	15,860.0	16,368.0	16,336.0	17,378.0	19,459.0	19,665.0
Mexico	882.0	912.0	959.9	999.1	1,063.7	1,086.5	1,103.4
Total North America	17,582.0	18,159.0	18,754.3	18,753.1	19,981.3	22,238.9	22,602.4
South America:							
Argentina	4,984.0	4,152.0	4,729.0	5,244.4	5,743.7	4,585.6	4,739.9
Brazil	3,036.8	2,996.5	3,018.3	2,989.3	2,870.4	3,168.0	3,093.1
Chile	308.2	332.9	330.7	317.5	297.6	288.6	252.6
Colombia	683.4	676.9	747.1	797.1	799.4	830.3	838.0
Paraguay	245.6	233.4	254.1	236.6	242.1	272.2	275.0
Peru	[3] 151.1	[3] 164.7	161.5	191.5	211.0	200.4	187.6
Uruguay	576.0	709.5	581.2	600.2	707.4	812.5	747.6
Venezuela	215.7	256.3	301.0	305.1	324.1	347.2	354.2
Total South America	10,200.8	9,522.2	10,122.9	10,681.7	11,195.7	10,504.8	10,488.0
Europe:							
Western:							
Belgium and Luxembourg	447.0	445.3	449.7	482.8	590.8	526.9	511.5
France	2,951.5	3,207.7	3,538.4	3,672.9	3,613.3	3,401.6	3,483.3
Germany, West	2,071.0	2,246.5	2,327.7	2,505.5	2,595.5	2,508.8	2,407.4
Italy	1,052.9	1,157.5	1,452.8	1,552.0	1,424.2	1,263.2	1,212.5
Netherlands	481.0	534.7	529.1	615.9	713.6	572.1	588.1
Total EEC	7,003.4	7,591.7	8,297.7	8,829.1	8,937.4	8,272.6	8,202.8
Austria	278.3	289.5	285.7	314.8	318.1	303.4	285.1
Denmark	356.7	339.1	301.8	377.9	380.7	339.9	337.3
Finland	151.4	157.8	150.8	177.7	195.1	215.4	211.9
Greece	48.9	53.0	62.6	97.0	111.9	123.4	132.3
Ireland	[3] 188.2	[3] 235.2	313.6	276.0	284.3	244.8	247.1
Norway	107.9	117.0	121.1	129.6	125.7	125.6	121.8
Portugal	86.2	92.8	102.1	115.3	107.6	99.6	110.2
Spain	311.0	352.7	392.4	359.4	379.2	496.0	390.2
Sweden	285.1	284.2	286.8	342.8	363.3	346.1	336.2
Switzerland	217.4	221.3	233.3	260.6	253.9	242.5	240.0
United Kingdom	1,782.5	1,836.4	2,019.8	2,024.0	2,081.4	1,931.3	1,835.5
Total Western Europe	10,817.0	11,570.7	12,567.7	13,304.2	13,538.6	12,740.6	12,450.4
Eastern:							
Bulgaria	158.4	99.9	140.0	177.5	191.1	(4)	(4)
Czechoslovakia	390.6	415.6	422.8	470.9	452.2	485.7	(4)
Germany, East	338.2	414.6	463.5	457.7	424.8	449.1	(4)
Hungary	248.0	285.0	279.0	302.0	312.6	255.8	(4)
Poland	641.4	720.5	735.7	857.4	964.3	1,012.4	(4)
Yugoslavia	299.8	313.1	350.5	498.2	485.0	423.3	445.3
Total Eastern Europe	2,076.4	2,248.7	2,391.5	2,763.7	2,830.0	[5] 2,826.3	[5] 2,846.3
Total Europe	12,893.4	13,819.4	14,959.2	16,067.9	16,368.6	[5] 15,566.9	[5] 15,296.7
USSR (Europe and Asia)	5,250.0	6,180.0	5,434.3	6,183.9	6,675.5	6,746.1	7,310.0
Africa:							
Egypt	386.0	364.0	395.1	425.5	357.1	324.5	290.5
Rhodesia and Nyasaland	153.0	178.3	180.3	184.8	203.1	205.0	205.5
South Africa, Republic of	842.4	885.3	908.3	924.5	1,072.0	1,096.0	1,063.0
Total Africa	1,381.4	1,427.6	1,483.7	1,534.8	1,632.2	1,625.5	1,559.0
Asia:							
Israel	15.2	24.9	25.3	26.5	30.6	33.1	35.0
Japan	298.3	314.0	314.7	322.1	409.9	493.7	485.2
Malaysia	20.7	22.7	23.6	21.9	21.8	23.3	25.0
Philippines	158.0	181.7	126.2	151.2	160.4	167.8	176.6
Total Asia	492.2	543.3	489.8	521.7	622.7	717.9	721.8
Oceania:							
Australia	1,799.0	1,684.3	1,417.0	1,772.0	2,047.0	2,208.0	2,255.8
New Zealand	559.1	523.7	554.8	643.1	642.8	644.9	607.9
Total Oceania	2,358.1	2,208.0	1,971.8	2,415.1	2,689.8	2,852.9	2,863.7
Total selected countries	50,157.9	51,859.5	53,216.0	56,158.2	59,165.8	[5] 60,253.0	[5] 60,841.6

[1] Carcass Weight Equivalent (CWE) basis. Total beef and veal production from the slaughter of both home-grown and imported cattle and calves. Excludes offals and the CWE of exported live animals. [2] Provisional. [3] May not be comparable with later years for which revisions were made. [4] Not available. [5] Includes allowances for countries shown for which data are not available.

Table 2.--BEEF AND VEAL[1]: Per capita consumption in selected countries, average 1956-60, annual 1960-65

Continent and country	Average 1956-60	1960	1961	1962	1963	1964[2]	1965[2]
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
North America:							
Canada	77	77	79	78	84	88	91
United States	91	91	94	95	100	107	106
Mexico	26	25	24	25	25	26	26
South America:							
Argentina	187	158	179	188	190	153	173
Brazil	47	45	40	39	36	39	36
Chile	43	45	44	42	38	38	32
Colombia	51	48	52	54	54	54	([3])
Paraguay	127	107	114	105	104	105	([3])
Peru	16	15	15	17	19	17	16
Uruguay	165	187	157	146	172	164	181
Venezuela	34	39	43	43	44	46	([3])
Europe:							
Western:							
Belgium and Luxembourg	49	48	51	54	63	59	56
France	65	68	72	71	72	70	72
Germany, West	39	42	45	48	49	48	47
Italy	26	29	31	34	38	36	34
Netherlands	40	40	43	48	50	38	38
Total EEC	44	45	48	50	53	51	50
Austria	40	41	41	45	44	43	41
Denmark	42	35	35	38	30	36	37
Finland	35	36	38	40	43	46	46
Greece	8	9	11	17	22	22	23
Ireland	28	31	26	29	31	32	35
Norway	31	33	33	32	33	35	33
Portugal	11	13	15	15	15	14	14
Spain	12	12	13	15	18	17	17
Sweden	41	40	42	45	44	44	42
Switzerland	45	48	49	54	51	55	52
United Kingdom	60	57	58	59	60	56	50
Eastern:							
Bulgaria	22	15	19	22	25	([3])	([3])
Czechoslovakia	31	32	38	42	41	([3])	([3])
Hungary	23	27	26	27	30	([3])	([3])
Poland	23	25	23	26	31	32	([3])
Yugoslavia	14	13	14	18	16	13	14
USSR (Europe and Asia)	26	29	25	28	28	30	([3])
Africa:							
Egypt	16	14	15	16	13	([3])	([3])
Rhodesia and Nyasaland	17	18	17	16	17	16	([3])
South Africa, Republic of	55	53	52	52	60	60	([3])
Asia:							
Israel	19	18	16	24	25	27	([3])
Japan	3	3	3	3	4	5	([3])
Malaysia	5	5	5	4	4	4	([3])
Philippines	9	8	5	7	6	7	([3])
Oceania:							
Australia	126	111	85	95	101	108	105
New Zealand	105	88	106	123	94	104	109

[1] Carcass Weight Equivalent (CWE) basis; excludes offals. [2] Provisional. [3] Not available.

Table 3.--BEEF: Wholesale prices in selected Western European markets and the United States, monthly average 1964 and 1965

(Quality roughly comparable to U.S. Grade Good)

Month	New York[1]		London[2]		London (imported)[3]		Brussels[2]	
	1964	1965	1964	1965	1964	1965	1964	1965
	Cents per pound		Cents per pound		Cents per pound		Cents per pound	
January	35.4	36.9	32.2	40.5	26.8	34.9	54.1	62.6
February	34.0	35.9	33.2	40.3	30.0	33.7	51.6	59.6
March	34.2	36.5	34.8	39.7	32.6	34.5	53.0	59.2
April	33.8	37.5	35.8	39.1	32.6	32.8	51.6	60.1
May	32.2	40.3	36.7	39.2	33.9	32.7	52.8	59.2
June	33.5	41.8	38.6	42.8	33.8	35.6	54.0	59.2
July	35.9	41.5	39.3	41.5	34.1	36.8	59.2	59.6
August	38.7	41.1	38.7	40.3	29.6	36.1	59.2	61.0
September	40.2	40.8	37.4	38.1	29.9	34.1	60.2	61.0
October	38.2	40.1	36.1	34.7	31.4	29.9	60.5	60.1
November	37.1	39.4	36.4	33.5	30.7	29.3	61.4	60.3
December	36.6	39.8	38.1	33.6	31.1	30.8	62.2	60.5

Month	Paris[2]		Hamburg[2]		Milan[2]		Rotterdam[2]	
	1964	1965	1964	1965	1964	1965	1964	1965
	Cents per pound		Cents per pound		Cents per pound		Cents per pound	
January	48.5	56.0	54.1	62.2	57.6	66.2	49.0	50.1
February	49.7	52.8	55.3	62.7	56.8	65.4	48.4	50.1
March	50.5	52.8	56.0	63.4	58.6	67.2	49.1	50.0
April	51.4	55.6	56.4	63.4	61.0	67.2	52.2	47.8
May	54.2	55.6	57.9	62.8	64.1	67.5	56.6	52.7
June	54.6	54.6	59.4	62.1	65.7	65.2	58.1	53.1
July	Unq.	55.0	57.2	60.4	66.1	65.2	55.5	52.4
August	Unq.	54.2	56.8	59.6	66.8	67.2	55.3	53.3
September	51.2	53.3	56.2	58.9	68.2	68.4	56.2	55.8
October	51.3	50.0	56.5	57.7	66.6	67.3	52.5	56.1
November	51.6	50.9	57.2	57.4	65.2	63.2	52.2	55.4
December	54.4	50.2	60.2	57.1	65.6	62.5	52.0	52.5

[1] Fresh steer beef, carlot basis, U.S. grade Good, carcass weight 600-700 pounds. [2] Fresh beef from home slaughter, roughly comparable to U.S. grade Good. [3] Chilled Argentine beef delivered in London, roughly comparable to U.S. grade Good.

exports were substantially reduced -- only 855 million pounds, or 28 percent less than in 1964. Uruguay's exports were 30 percent smaller.

Australia and New Zealand exported 1.4 billion pounds -- a sum like 1964's but with an even larger share moving to Western Europe rather than to the United States. U.S. imports of beef in 1965 amounted to 942 million pounds -- down 13 percent from 1964's already reduced level.

In 1964, leading exporters of beef and veal were Argentina, Australia, New Zealand, and Uruguay in that order; together, they supplied 64 percent of world exports that year. Other important suppliers were France, Netherlands, Yugoslavia, Denmark, Ireland, and the USSR.

Principal importers of beef and veal in 1964 were the United Kingdom, United States, Italy and West Germany; together, they accounted for 72 percent of that year's world imports.

Table 4.--BEEF AND VEAL[1]: International trade in selected countries, average 1956-60, annual 1960-65

Continent and country	Average 1956-60		1960		1961		1962		1963		1964[2]		1965[2]	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
North America:														
Canada	38.8	53.4	25.9	49.1	37.5	55.6	27.7	57.3	25.6	63.8	42.8	47.8	92.0	32.0
United States	60.2	671.0	36.0	775.0	36.0	1,037.0	32.0	1,440.0	33.0	1,677.0	66.0	1,085.0	54.0	942.0
Honduras	--	--	5.3	--	7.6	--	14.4	--	14.5	--	12.3	--	15.9	--
Mexico	52.9	.4	63.2	.2	78.7	.1	85.1	1.5	101.9	.6	71.1	.5	68.1	(3)
Dominican Republic	3.4	.1	5.5	.1	3.5	--	6.3	--	(4)	--	(4)	--	(4)	--
Total North America[5]	155.3	724.9	135.9	824.4	163.3	1,092.7	165.5	1,498.8	179.0	1,741.4	195.2	1,133.3	233.0	974.0
South America:														
Argentina	1,206.9	--	848.7	--	925.2	--	1,181.0	--	1,600.1	--	1,194.6	--	855.2	--
Brazil	91.2	--	49.4	--	92.9	--	73.6	--	54.8	--	75.3	--	155.1	--
Chile	--	6.6	--	9.1	--	17.1	--	18.3	--	10.4	--	29.4	--	19.1
Paraguay	31.8	--	44.7	--	46.6	--	45.7	--	44.1	--	48.5	--	(4)	--
Peru	--	8.5	--	1.3	--	6.0	--	8.4	--	10.0	--	9.1	--	9.1
Uruguay	128.8	--	180.1	--	136.1	--	182.0	--	213.6	--	322.0	--	224.0	--
Venezuela	(3)	2.2	--	6.7	--	(3)	--	.1	--	(3)	--	(3)	--	(3)
Total South America[5]	1,458.7	17.3	1,122.9	17.1	1,200.8	23.1	1,482.3	26.8	1,912.6	20.4	1,640.4	38.5	1,282.3	28.2
Europe:														
Belgium and Luxembourg	11.5	24.1	12.0	21.3	1.5	33.1	6.1	38.2	26.4	45.8	10.6	57.1	8.6	35.3
France	89.1	62.3	169.5	68.0	277.8	26.5	381.4	22.0	264.6	86.0	199.1	175.2	189.7	159.4
Germany, West	28.9	127.2	48.1	143.5	26.2	214.4	29.1	262.1	29.1	238.9	26.3	313.1	10.0	358.8
Italy	1.4	224.0	.3	301.4	9.0	125.7	9.9	218.1	8.4	570.1	9.2	625.9	12.3	573.5
Netherlands	62.1	34.9	102.2	34.6	84.6	50.7	106.7	50.7	155.7	41.0	193.1	81.1	187.3	69.1
Total EEC	193.0	472.5	332.1	568.8	399.1	450.4	533.2	591.1	484.2	981.8	438.3	1,252.4	407.9	1,196.1
Austria	2.5	5.1	9.7	6.6	.3	7.2	1.5	6.9	8.6	5.1	1.4	11.8	6.0	20.0
Denmark	167.6	--	176.9	--	140.1	.2	201.5	.4	241.4	.3	170.2	.2	162.8	.3
Finland	(6)	(6)	--	.7	--	21.6	(3)	2.5	.4	--	.3	--	3.2	1.8
Greece	--	18.2	--	25.5	--	33.1	--	45.9	--	77.7	--	65.4	--	62.0
Ireland	106.8	--	146.5	--	239.7	--	194.9	--	197.1	(3)	154.3	(3)	147.5	(3)
Norway	1.8	1.8	.7	3.3	3.0	2.3	12.4	1.5	5.3	1.6	2.1	3.7	1.1	2.4
Portugal	1.3	9.2	.2	17.1	--	23.1	--	14.1	.2	23.9	.2	21.4	--	21.6
Spain	--	50.6	--	25.7	.8	10.6	1.1	97.0	.1	189.0	.3	49.9	.3	157.1
Sweden	3.8	27.4	.8	16.9	.6	31.2	17.8	21.4	44.3	14.2	23.3	23.8	38.8	26.9
Switzerland	--	18.5	(3)	39.9	7.8	43.2	8.1	53.1	8.2	44.6	7.0	83.5	6.9	72.7
United Kingdom	20.3	1,352.6	12.8	1,145.9	9.2	1,040.2	7.2	1,134.8	11.6	1,156.3	22.3	1,133.1	27.5	934.1
Total Western Europe	497.1	1,955.9	679.7	1,850.4	800.6	1,663.1	977.7	1,968.7	1,001.4	2,494.5	819.7	2,645.2	802.0	2,495.0
Bulgaria	--	8.1	--	15.9	.9	9.3	4.3	1.9	3.0	10.3	(4)	(4)	(4)	(4)
Czechoslovakia	--	25.1	--	16.6	--	93.8	--	112.7	--	118.4	--	(4)	(4)	(4)
Hungary	22.8	2.8	20.7	6.4	39.2	17.4	62.5	28.7	65.5	56.4	(4)	(4)	(4)	(4)
Poland	1.0	14.1	4.5	15.5	63.0	11.4	84.0	7.5	59.5	38.6	53.7	31.3	(4)	(4)
Yugoslavia	46.7	2.5	66.5	.2	96.4	.1	168.0	.1	183.1	2.2	178.9	.1	(4)	(4)
Total Eastern Europe[5]	70.5	52.6	91.7	54.6	199.5	132.0	318.8	150.9	311.1	225.9	295.1	235.4	(4)	(4)
Total Europe[5]	567.6	2,008.5	771.4	1,905.0	1,000.1	1,795.1	1,296.5	2,119.6	1,312.5	2,720.4	1,114.8	2,880.6	(4)	(4)
USSR (Europe and Asia)	172.8	282.5	164.5	154.3	147.4	115.1	297.0	343.0	411.2	59.5	138.0	212.2	(4)	(4)
Africa:														
Egypt	(3)	5.3	(3)	8.2	(3)	8.0	.2	4.5	(3)	5.5	(3)	23.6	(4)	31.7
Ghana	--	11.2	--	9.9	--	12.1	--	9.8	--	8.5	--	(4)	(4)	(4)
Rhodesia & Nyasaland	17.0	10.0	25.8	4.3	31.8	5.2	34.2	4.3	40.7	3.6	43.8	.5	(4)	(4)
South Africa, Republic of	19.7	8.1	25.1	6.7	37.4	2.9	40.2	2.1	54.4	1.0	62.6	.7	(4)	(4)
Total Africa[5]	36.7	34.6	50.9	29.1	69.2	28.2	74.6	20.7	95.1	18.6	106.4	32.8	(4)	(4)
Asia:														
Hong Kong	.2	8.3	.1	5.5	.1	6.2	.1	5.2	(3)	8.1	(3)	7.1	(4)	(4)
Israel	--	21.5	--	12.9	--	9.7	--	28.5	--	31.2	--	37.5	--	49.8
Japan	.6	17.2	.6	12.9	.1	12.0	.1	10.8	.3	10.8	(3)	14.2	(3)	24.5
Malaysia	.6	12.8	.5	12.7	.5	12.0	.4	9.3	.6	12.9	1.0	11.1	(4)	(4)
Philippines	--	51.1	--	42.4	--	25.8	--	43.1	--	29.3	--	38.6	--	38.6
Total Asia[5]	1.4	110.9	1.2	86.4	.7	65.7	.6	96.9	.9	92.3	1.0	108.5	(4)	(4)
Oceania:														
Australia	549.3	--	532.1	--	529.3	--	756.9	--	932.5	--	1,009.5	--	1,060.8	--
New Zealand	317.7	--	312.6	--	292.8	--	331.9	--	400.1	--	373.0	--	320.3	--
Total Oceania	867.0	--	844.7	--	822.1	--	1,088.8	--	1,332.6	--	1,382.5	--	1,381.1	--
Total 46 selected countries[5]	3,259.5	3,178.7	3,091.5	3,016.3	3,403.6	3,119.9	4,405.3	4,105.8	5,243.9	4,652.6	4,578.3	4,450.9	(4)	(4)

[1] Carcass Weight Equivalent (CWE) basis; excludes offals, animal fats, and live animals. [2] Provisional. [3] Less than 50,000 pounds. [4] Not available. [5] Totals include an allowance for countries shown for which data are not available. [6] Breakdown of total meat by type is not available.

Table 5.--BEEF AND VEAL[1]: Major exporting and importing countries, trade and percent of total trade, average 1956-60, annual 1963 and 1964

Countries	Quantity			Percent of total		
	Average 1956-60	1963[2]	1964[2]	Average 1956-60	1963[2]	1964[2]
	Mil. lb.	Mil. lb.	Mil. lb.	Percent	Percent	Percent
Exporting countries:						
Argentina	1,206.9	1,600.1	1,194.6	37.0	30.5	26.1
Australia	549.3	932.5	1,009.5	16.9	17.8	22.0
New Zealand	317.7	400.1	373.0	9.8	7.6	8.2
Uruguay	128.8	213.6	322.0	4.0	4.1	7.0
France	89.1	264.6	199.1	2.7	5.1	4.4
Netherlands	62.1	155.7	193.1	1.9	3.0	4.2
Yugoslavia	46.7	183.1	178.9	1.4	3.5	3.9
Denmark	167.6	241.4	170.2	5.1	4.6	3.7
Ireland	106.8	197.1	154.3	3.3	3.8	3.4
USSR (Europe & Asia)	172.8	411.2	138.0	5.3	7.9	3.0
Brazil	91.2	54.8	75.3	2.8	1.0	1.6
Mexico	52.9	101.9	71.1	1.6	1.9	1.6
United States	60.2	33.0	66.0	1.8	.6	1.4
South Africa, Republic of	19.7	54.4	62.6	.6	1.0	1.4
Poland	1.0	59.5	53.7	([3])	1.1	1.2
Paraguay	31.8	44.1	48.5	1.0	.8	1.1
Canada	38.8	25.6	42.8	1.2	.5	.9
Other	116.1	271.2	225.6	3.6	5.2	4.9
Total 46 countries	3,259.5	5,243.9	4,578.3	100.0	100.0	100.0
Importing countries:						
United Kingdom	1,352.6	1,156.3	1,133.1	42.5	24.9	25.4
United States	671.0	1,677.0	1,085.0	21.1	36.0	24.4
Italy	224.0	570.1	625.9	7.0	12.2	14.1
Germany, West	127.2	238.9	313.1	4.0	5.1	7.0
USSR (Europe & Asia)	282.5	59.5	212.2	8.9	1.3	4.8
France	62.3	86.0	175.2	1.9	1.8	3.9
Switzerland	18.5	44.6	83.5	.6	1.0	1.9
Netherlands	34.9	41.0	81.1	1.1	.9	1.8
Greece	18.2	77.7	65.4	.6	1.7	1.5
Belgium-Luxembourg	24.1	45.8	57.1	.8	1.0	1.3
Spain	50.6	189.0	49.9	1.6	4.1	1.1
Canada	53.4	63.8	47.8	1.7	1.4	1.1
Other	259.4	402.9	521.6	8.2	8.6	11.7
Total 46 countries	3,178.7	4,652.6	4,450.9	100.0	100.0	100.0

[1] Carcass Weight Equivalent (CWE) basis; excludes offals, animal fats, and live animals. [2] Provisional. [3] Less than 0.05 percent.

Conditions in early 1966 indicated that production this year will be up moderately in nearly all regions of the world. Larger export supplies will be available. Nevertheless, continued strong import demand is expected to sustain world beef prices at relatively high levels.

Relative price differences between the two major importing regions -- Western Europe and the United States -- will be the major factor determining this year's pattern and direction of beef trade; shipments from Australia and New Zealand will be particularly affected. Both importing regions are expected to purchase somewhat larger quantities in 1966.

NORTH AMERICA

CANADA

Livestock and meat production is one of the most important segments of Canada's overall agricultural economy. Though most of the domestic production is consumed domestically, Canada is still considered an important exporter of most livestock and meat products; and, although the volume is relatively small, Canada regularly exports to approximately 80 countries throughout the world.

Canada competes with the United States for trade in foreign markets primarily for export of the following items: breeding cattle, tallow, variety meats, and hides and skins. This competition for trade in world markets is expected to continue but not increase, since Canada's current and anticipated home consumption needs are not expected to permit any major gain in the outflow of livestock production to world markets.

Beef and veal production has been easing upward in recent years and in 1965 totaled 1.8 billion pounds, compared with an average of 1.3 billion per year for 1956-60. Most of the increased production has moved into domestic channels, as a result of gains in population as well as a gain in overall per capita consumption.

Livestock production in Canada varies considerably among provinces; in most instances, livestock population figures are not a reliable indicator for gauging meat production in any particular province. For example, large numbers of cattle and calves produced for slaughter in the Prairie Provinces are moved to Eastern Canada, to British Columbia, and to the United States when conditions permit. However, this trend to move cattle closer to the more densely populated areas for slaughter has been reversing itself in recent years, so that at present new packinghouse facilities are being constructed in the Western Provinces.

Canada enjoys a flourishing trade in the export of live animals, principally cattle and calves, to the United States. In the postwar period, this trade ranged from 105,000 head in 1946 to 459,000

Table 6.--CANADA: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	10,696	10,932	11,206	11,552	11,900
Imported[4]	....do...	1	1	(5)	31	(5)
Exported[4]	....do...	459	453	244	184	560
Slaughtered[6]	....do...	3,560	3,493	3,725	4,050	4,494
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	1,426.4	1,418.0	1,539.6	1,693.4	1,834.0
Domestic output (+):[8]						
From home-grown cattle	....do...	1,426.2	1,417.2	1,539.4	1,677.0	1,834.0
From exported live cattle	....do...	123.6	113.7	61.5	43.4	132.0
Gross domestic output	....do...	1,549.8	1,153.9	1,600.9	1,720.4	1,966.0
Imports (+):						
Live cattle & calves	....do...	0.2	0.7	0.2	16.4	(5)
Fresh, chilled or frozen	....do...	16.4	23.1	24.2	13.9	9.0
Canned & preserved	....do...	39.2	34.2	39.6	33.9	23.0
Total imports	....do...	55.8	58.0	64.0	64.2	32.0
Exports (-):						
Live cattle & calves	....do...	123.6	113.7	61.5	43.4	132.0
Fresh, chilled or frozen	....do...	34.2	24.7	21.8	38.1	72.0
Canned & preserved	....do...	3.3	3.0	3.8	4.7	20.0
Total exports	....do...	161.1	141.4	87.0	86.1	224.0
Consumption:						
Total	....do...	1,444.5	1,447.5	1,577.8	1,698.5	1,774.0
Per capita	Pounds	79.2	77.9	83.5	88.3	90.6
Human population	1,000	18,238	18,570	18,896	19,235	19,571

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

in 1948. Then, in 1952, exports dropped sharply to 15,000 head because of an outbreak of foot-and-mouth disease and a resulting embargo on trade with the United States. In recent years, however, trade with the United States has improved considerably, ranging from a high of 670,000 in 1958 to 222,000 in 1964. Current estimates indicate that cattle and calf exports to the United States in 1965 totaled about 593,000 head. Most of the cattle Canada ships to the United States are feeders weighing 200-700 pounds.

Exports of beef from Canada in 1964 totaled 42.8 million pounds, with about 35 million of this total moving to the United States. In 1965, beef exports jumped to 92 million pounds. Most of the beef exported from Canada is in the fresh, chilled, and frozen category with minimum quantities moving out as canned or preserved meat. Exports of beef to the United States are expected to be up substantially in 1965-66, because of strong demand and an expected favorable price situation in the United States.

Canada and the United States are active trading partners for practically all products of the livestock and meat products industry. Since livestock, meat and meat products move with a minimum of restraints across the border, the direction of trade between countries is mainly dependent upon such factors as prices, transportation costs, and the current monetary exchange; the tariff rates imposed by both countries on practically all livestock and meat product items are generally identical.

MEXICO

The long-established Mexican cattle industry has played an important role in that country's economic and social development over the years. In the process of building this industry, Mexico also developed a healthy export trade in live cattle (stockers and feeders) and processing-type beef -- practically all moving to the United States. A serious and unfortunate outbreak of foot-and-mouth disease in Mexico resulted in the curtailment of this trade during the periods December 1946-August 1952 and May 1953-December 1954. When the disease was eradicated, exports of cattle and beef to the United States were resumed.

In recent years, beef consumption in Mexico has risen at a faster rate than moderate increases in domestic production. Demand continued to expand, largely on the basis of increased population and higher living levels. Larger domestic supplies have been necessary to satisfy total consumption requirements. On the other hand, total exports have been declining since 1961. Dressed beef exports in 1964 fell off 30 percent from the previous year; live cattle exports dropped 35 percent. In 1965, beef exports declined a further 4 percent, while rumored tax increases on exported live cattle stimulated shipments in the latter part of the year to show a 57 percent increase over 1964.

Last year, reduced marketings in Mexico City prompted the Government to authorize imports of live slaughter cattle from the United States. Around 15,000 head -- mainly cows -- were imported for slaughter in Mexico City. These were in addition to Mexico's traditional imports of cattle for breeding purposes which also amounted to some 15,000 head. In July, authorities temporarily banned exports of cattle weighing over 440 pounds but removed the embargo later in the year. A 65-percent reduction in cattle export duties authorized last year was still in effect in early 1966. An earlier Mexico City ordinance restricting sale of meat to that from animals slaughtered in the municipal packing plant was removed at the outset of 1966. Other federally-inspected packing plants now also may supply and distribute meat in the big Mexico City market. It is expected that this move will help to alleviate difficulties previously encountered in supplying beef to that growing municipal market.

Table 7.--MEXICO: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	18,125	19,067	20,185	21,638	22,965
Imported[4]	....do...	0	0	0	0	15
Exported[4]	....do...	549	766	553	358	561
Slaughtered[5]	....do...	2,983	3,044	3,202	3,252	3,300
Beef and Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	959.9	999.1	1,063.7	1,086.5	1,103.4
Domestic output (+):[7]						
From home-grown cattle	....do...	959.9	999.1	1,063.7	1,086.5	1,095.9
From exported live cattle	....do...	63.1	70.1	57.2	37.1	58.1
Gross domestic output	....do...	1,023.0	1,069.2	1,120.9	1,123.6	1,154.0
Imports (+):						
Live cattle and calves	....do...	0	0	0	0	7.5
Fresh, chilled or frozen	....do...	.1	1.5	.6	.5	(8)
Canned and preserved	....do...	(8)	(8)	(8)	(8)	(8)
Total imports	....do...	.1	1.5	.6	.5	7.5
Exports (-):						
Live cattle and calves	....do...	63.1	70.1	57.2	37.1	58.1
Fresh, chilled or frozen	....do...	78.7	85.1	101.9	71.1	68.1
Canned and preserved	....do...	(8)	(8)	(8)	(8)	(8)
Total exports	....do...	141.8	155.2	159.1	108.2	126.2
Consumption:						
Total	....do...	881.3	915.5	962.4	1,015.9	1,035.3
Per capita	Pounds	24.5	24.7	25.2	25.8	25.8
Human population	1,000	35,999	37,108	38,251	39,429	40,643

[1] Provisional. [2] Estimated. [3] Spring. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Negligible.

UNITED STATES

Today, nearly one-third of the world's beef supply is produced and consumed in the United States.

In recent years, the United States has also been the world's major importer of beef followed closely by the United Kingdom. Imported beef is mainly lower grade manufacturing-type meat, for use in processing (sausage-making, etc.) or canned and preserved types like corned-beef.

As long as 200 years ago, pioneering Americans, driving their livestock along as they moved West, were unknowingly laying the foundation for the largest cattle industry ever developed.

Long before, European cattle had been introduced on the North American continent when Hernando Cortez -- Spanish conquistador -- brought some Andalusian cattle into Mexico in the 16th Century. From these were developed the world-famous "Texas Longhorns." On the East Coast, the first sizable shipment of cattle from Europe had arrived in 1610. By the turn of the century -- around 1700 -- an important cattle industry had already developed in New England. Later, the movement West carried cattle with it to midwestern grasslands, across the Great Plains, through the Rockies, and then beyond -- all the way to the Pacific Coast.

Sophistication of the American cattle industry started in 1783 when the first Western-type purebred cattle -- "Shorthorns" -- were brought to the United States from England. In 1817, Henry Clay introduced "Herefords" to the United States from Herefordshire, England. From Aberdeen County -- in northeastern Scotland -- came the "Angus" in 1873. Indian cattle ("hump-type") were imported between 1854 and 1926. These were crossed with improved, Western-type breeds which gave rise to the "American Brahman" breed. Beginning in 1910, crossbreeding of Brahman bulls and Shorthorn cows gave rise to the "Santa Gertrudis".

American cattle breeders have made every effort to improve their cattle lines. Maximum beef output with minimum feed input became the basic aim of most American beef-cattlemen. Purebred American beef breeding cattle have also been exported as foundation stock to all parts of the globe.

During 1963 and 1964, American cattlemen witnessed severely depressed prices which recovered only when domestic production levelled.

Production of beef and veal in the United States set another new record in 1965, though it increased only slightly following substantial gains in 1963 and 1964. Cattle and calf slaughter was up about 4 percent in 1965, but because of lighter slaughter weights, beef and veal production rose only about 1 percent.

Imports of beef and veal were 35 percent less in 1964 than in the previous year; a further 13 percent decline occurred in 1965. Most of the major countries supplying beef and veal for the U.S. market (Australia, New Zealand, Argentina, Ireland, and Mexico) began selling less beef and veal to this country in 1964, when prices firmed in Europe and weakened in the United States. Even less was exported to the United States in 1965.

Consumption of beef and veal rose to 107 pounds per person in 1964, a new record. The increase came about entirely from larger domestic production because imports were down considerably. Consumption declined only slightly in 1965, when the increase in production was not quite large enough to offset the combination of growth in population and still smaller imports.

Beef and veal exports are small in relation to production. Exports of beef and veal were larger in 1964 than in other recent years, but fell off slightly in 1965.

Live cattle exports rose sharply in 1964 when feeder cattle were shipped to Europe for the first time in this century. Imports of live cattle come mostly from Canada and Mexico and are mainly feeder-type animals that are grain-fed in the United States from 3 to 9 months before slaughter. Live cattle imports declined somewhat in 1964 when feeder cattle prices dropped to low levels. A pick-up in feeder cattle prices prompted an increase in imports during 1965.

What has happened to the American cattle and beef industry during the past two years is only characteristic of the cyclical movements that are expected to occur in any large-scale business involving livestock.

Table 8.--UNITED STATES: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	97,534	100,002	103,736	106,743	107,184
Imported[4]	....do....	1,023	1,232	834	529	1,111
Exported[4]	....do....	2	1	1	33	22
Slaughtered[5]	....do....	34,548	34,759	35,262	39,291	40,932
Beef and Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	16,368	16,336	17,378	19,459	19,665
Domestic output (+):[7]						
From home-grown cattle	....do....	16,118	16,056	17,198	19,346	19,400
From exported live cattle	....do....	1	1	([8])	14	9
Gross domestic output	....do....	16,119	16,057	17,198	19,360	19,409
Imports(+):						
Live cattle and calves	....do....	250	280	180	113	265
Fresh, chilled or frozen	....do....	807	1,227	1,409	948	790
Canned and preserved	....do....	230	213	269	137	152
Total imports	....do....	1,287	1,720	1,858	1,198	1,207
Exports(-):						
Live cattle and calves	....do....	1	1	([8])	14	9
Fresh, chilled or frozen	....do....	11	10	9	35	34
Canned and preserved	....do....	25	22	24	31	20
Total exports	....do....	37	33	33	80	63
Consumption:						
Total	....do....	17,369	17,744	19,023	20,478	20,553
Per capita	Pounds	94.5	95.0	100.4	106.6	105.6
Human population	Million	183.8	186.7	189.4	192.1	194.6

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Less than 500,000 pounds.

Table 9.--BEEF AND VEAL:[1] U.S. imports by country of origin, 1958-65

Country of origin	1958	1959	1960	1961	1962	1963	1964	1965[2]
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Australia	17,715	224,034	144,684	233,855	441,718	517,042	377,148	307,421
New Zealand	183,672	161,617	130,723	154,447	213,594	235,690	168,108	103,560
Canada	53,616	22,564	18,884	32,322	19,361	17,226	28,758	71,373
Argentina	216,723	128,573	52,650	65,163	55,912	87,431	54,410	54,835
Mexico	75,032	48,939	39,116	53,384	59,290	72,969	48,904	46,283
Brazil	13,619	36,007	9,023	16,304	17,206	10,887	10,415	24,729
Nicaragua	40	5,768	10,127	14,577	15,795	24,518	23,566	18,400
Paraguay	14,385	14,098	9,988	10,081	8,167	12,283	12,098	16,645
Uruguay	9,548	12,945	10,753	14,453	16,126	16,055	14,511	16,013
Honduras	409	1,509	3,391	5,542	9,324	9,336	8,572	10,715
Costa Rica	2,806	9,840	15,335	8,719	8,111	15,163	17,662	10,310
Guatemala	--	--	--	1,927	12,268	14,773	11,832	9,556
Ireland	23,775	41,984	52,793	64,449	70,725	72,925	20,058	7,824
Haiti	--	--	--	402	2,765	2,732	3,274	2,588
Denmark	2,472	3,428	4,536	6,490	7,680	6,146	86	203
United Kingdom	20	1,708	2,119	1,318	6,900	3,978	213	12
Dominican Republic	4,143	5,369	5,494	3,829	739	13	47	17
Others	1,248	3,965	2,989	1,875	1,834	3,252	739	659
Total	619,223	722,348	512,605	689,137	967,515	1,122,419	800,401	701,143

[1] Product weight basis; not converted to carcass weight equivalent. [2] Provisional.

Table 10.--BEEF AND VEAL:[1] U.S. imports by type and country of origin, 1965[2]

Country of origin	Fresh and frozen					Canned beef[3]	Prepared and preserved	Total
	Bone-in beef		Boneless	Cuts (Prepared)	Veal			
	Frozen	Fresh						
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Australia.....	1,928	299	300,581	140	2,202	238	2,034	307,422
New Zealand.....	269	87	91,428	48	11,726	--	2	103,560
Canada.....	3,193	22,524	39,339	1,300	4,713	50	255	71,374
Argentina.....	--	--	--	1,077	--	40,546	13,212	54,835
Mexico.....	--	4	46,056	2	214	--	7	46,283
Brazil.....	--	198	--	190	--	19,746	4,595	24,729
Nicaragua.....	39	217	18,065	--	--	--	79	18,400
Paraguay.....	--	--	--	--	--	16,616	29	16,645
Uruguay.....	--	--	--	79	--	15,250	683	16,012
Ireland.....	--	--	7,824	--	--	--	--	7,824
Others.....	145	435	32,696	8	--	308	467	34,059
Total.....	5,574	23,764	535,989	2,844	18,855	92,754	21,363	701,143

[1] Product weight basis; not converted to carcass weight equivalent. [2] Provisional. [3] Includes canned beef sausage.

Table 11.--BEEF AND VEAL: U.S. production, imports and exports, carcass weight equivalent, and cattle prices, 1952-65

Year	U.S. production	U.S. imports		Cattle prices[2]	U.S. exports[1]
		Beef and veal[1]	Imports as percent of production		
	Million pounds	Million pounds	Percent	Dollars	Million pounds
1952.....	10,819	429	4.0	24.30	20
1953.....	13,953	271	1.9	16.30	47
1954.....	14,610	232	1.5	16.00	49
1955.....	15,147	229	1.5	15.60	50
1956.....	16,094	211	1.3	14.90	98
1957.....	15,728	395	2.5	17.20	100
1958.....	14,516	909	6.3	21.90	33
1959.....	14,588	1,063	7.2	22.60	34
1960.....	15,860	775	4.9	20.40	36
1961.....	16,368	1,037	6.3	20.20	36
1962.....	16,336	1,440	8.8	21.30	32
1963.....	17,378	1,677	9.7	19.90	33
1964.....	19,459	1,085	5.6	18.00	66
1965[3].....	19,665	942	4.8	[4] 19.92	54

[1] Canned and other processed meats have been converted to their dressed weight equivalent. [2] U.S. weighted average received by farmers for beef cattle per 100 pounds. [3] Preliminary. [4] Simple average.

Table 12.--CATTLE AND CALVES: U.S. imports and exports, 1952-65

Year	Imports				Exports			
	Dutiable cattle		Cattle for breeding	Total	Cattle for breeding		Other	Total
	Number[1]	Beef equivalent of live cattle[2]			Dairy	Beef		
	1,000 head	Million pounds	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head
1952.....	138	47	2	140	(3)	(3)	3	11
1953.....	177	62	21	198	(3)	(3)	4	15
1954.....	71	35	15	86	(3)	(3)	4	21
1955.....	296	93	18	314	(3)	(3)	10	35
1956.....	141	43	19	159	(3)	(3)	13	37
1957.....	703	221	25	728	(3)	(3)	7	44
1958.....	1,126	340	26	1,152	6	18	2	26
1959.....	688	191	20	709	6	12	32	50
1960.....	645	163	19	663	12	15	5	32
1961.....	1,023	250	20	1,043	12	10	2	24
1962.....	1,232	280	18	1,250	9	9	1	19
1963.....	834	180	19	853	11	11	1	23
1964.....	529	113	18	547	11	18	33	62
1965.....	1,111	265	18	1,129	18	15	22	55

[1] Includes milk cows. [2] Carcass weight; estimated at 53 percent of the live weight of all dutiable cattle imported. [3] 1952-57 not separately classified.

SOUTH AMERICA

ARGENTINA

Argentina is the leading exporter of beef. Usually, between 750 million and 1 billion pounds of Argentine beef move in international trade each year. This is in addition to Argentina's domestic consumption, traditionally the world's highest per capita. This means that production also is relatively high, exceeding 5 billion pounds per year.

Argentina's 45 million head of cattle are concentrated largely in the natural pasture zones of the fertile Pampa to the north and south of Buenos Aires. Mixed farming -- livestock and crops -- is common on the more fertile lands of the Pampas, while cattle are also grazed in the subtropical areas to the north and the dry area to the west of the Pampas. Thus, there are considerable variations in production practices and the conditions under which beef is produced in Argentina.

In 1963, drought caused substantial increases in slaughtering and left behind a problem of rebuilding herds to usual levels. Beef production declined about 21 percent in 1964, with both number slaughtered and live cattle exported dropping sharply as ranchers began rebuilding their herds. Per capita consumption of beef also fell to an estimated 153 pounds. As a consequence, domestic prices rose; government policies designed to encourage exports of beef appeared to be relatively ineffective. In the first half of 1965, both production and exports of beef continued to decline as ranchers held back both breeding stock and steers for further herd rebuilding. Beef production and exports increased in the latter part of 1965, as more cattle were marketed for slaughter.

Traditional markets for Argentine beef met with lack of supplies; scarcities were further aggravated by the successful development of new markets for Argentine beef. As a consequence, importers in the United Kingdom and the other European Economic Community (EEC) countries

are concerned over prospects that Argentina may not be able to meet their import requirements for beef. These importers have been canvassing other exporting countries for beef of similar quality and price to that which they have been accustomed to buying from the Argentine.

The Argentine Government and industry officials are striving to increase beef production by encouraging ranchers to adopt improved management practices designed to increase output per animal unit and per acre. These improved practices fall primarily into 2 broad categories: (1) disease control; and (2) pasture improvement programs.

In terms of disease control, such measures have reportedly been very successful. Widespread vaccination for foot-and-mouth has kept this disease in check. Also, many ranchers are vaccinating all heifer calves for brucellosis.

In terms of pasture improvement, however, success is not so immediately apparent. A hundred years of grazing and cropping, with very little application of fertilizer, has caused some depletion of the fertile soils in the major livestock region. Establishment of improved grasses along with subdivision of pastures, by the more progressive ranchers, shows that Argentina has the potential for a many-fold increase in beef production. However, the rate at which these practices have been adopted in recent years indicates only a gradual increase in beef output for the immediate future.

Table 13.--ARGENTINA: Cattle and Beef, production, foreign trade, and consumption 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	43,165	42,552	40,344	42,300	45,000
Imported[4]	....do...	1	(5)	(5)	(5)	(5)
Exported[4]	....do...	157	244	279	163	97
Slaughtered[6]	....do...	10,212	11,790	12,926	9,500	10,000
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	4,729.0	5,244.4	5,743.7	4,585.6	4,739.9
Domestic output (+):[8]						
From home-grown cattle	....do...	4,728.0	5,244.4	5,743.7	4,585.6	4,739.9
From exported live cattle	....do...	70.6	109.6	125.6	73.2	43.5
Gross domestic output	....do...	4,798.6	5,354.0	5,869.3	4,658.8	4,783.4
Imports (+):						
Live cattle & calves	....do...	.6	(5)	(5)	(5)	(5)
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total imports	....do...	.6	(5)	(5)	(5)	(5)
Exports (-):						
Live cattle & calves	....do...	70.6	109.6	125.6	73.2	43.5
Fresh, chilled or frozen	....do...	636.7	922.9	1,245.6	974.3	762.2
Canned & preserved	....do...	288.5	258.1	354.5	220.3	93.0
Total exports	....do...	995.8	1,290.6	1,725.7	1,267.8	898.7
Consumption:						
Total	....do...	3,804.4	4,063.4	4,143.6	3,391.0	3,884.7
Per capita	Pounds	178.6	188.2	190.4	153.2	172.7
Human population	1,000	21,294	21,594	21,762	22,132	22,500

[1] Provisional. [2] Estimated. [3] June. [4] Excluding cattle for breeding. [5] Negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

BRAZIL

Unlike that of many other important world beef producers and exporters, only a small share of Brazil's output of beef -- roughly 2 percent -- enters foreign trade. That means that 98 percent of her total supply is consumed domestically.

Beef production has fluctuated only moderately in recent years. No significant trends are evident, though cattle numbers have been advancing steadily. However, because population and total demand for beef have been increasing at an even faster pace, per capita consumption has gradually fallen off.

In 1964, high world prices caused Brazilian beef exports to increase by 35 percent from the previous year's reduced level. Brazil's major chilled beef export markets are in Western Europe -- primarily Italy and Spain -- while most canned beef moves to the United States.

Table 14.--BRAZIL: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	74,025	76,244	79,139	79,918	81,515
Imported[4]	....do...	14	16	13	10	1
Exported[4]	....do...	0	([5])	2	1	3
Slaughtered[6]	....do...	7,141	6,989	7,065	7,150	7,350
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	3,018.3	2,989.3	2,870.4	3,168.0	3,093.1
Domestic output (+):[8]						
From home-grown cattle	....do...	3,013.7	2,985.1	2,867.21	3,165.2	3,092.7
From exported live cattle	....do...	0	([5])	.3	.2	1.1
Gross domestic output	....do...	3,013.7	2,985.1	2,867.5	3,165.4	3,093.8
Imports (+):						
Live cattle & calves	....do...	4.6	4.2	3.2	2.8	.4
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	([5])	0	0	0	0
Total imports	....do...	4.6	4.2	3.2	2.8	.4
Exports (-):						
Live cattle & calves	....do...	0	([5])	.3	.2	1.1
Fresh, chilled or frozen	....do...	32.5	28.6	27.7	41.9	90.0
Canned & preserved	....do...	60.4	45.0	27.1	33.4	65.1
Total exports	....do...	92.9	73.6	55.1	74.3	156.2
Consumption:						
Total	....do...	2,925.4	2,915.7	2,815.6	3,093.9	2,937.6
Per capita	Pounds	40.0	38.7	36.3	38.8	35.8
Human population	1,000	73,088	75,271	77,521	79,837	82,000

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

CHILE

In recent years, roughly a third of Chile's total beef consumption has been derived from imports. Domestic output from home-bred cattle and calves has been about constant. The beef equivalent of imported live cattle has been declining. As a result, total and per capita consumption were significantly lower in 1964 than in 1961.

Table 15.--CHILE: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	2,945	2,940	2,935	2,900	2,922
Imported[4]	....do....	198	161	131	120	70
Exported[4]	....do....	0	0	0	0	0
Slaughtered[5]	....do....	586	570	560	550	470
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	330.7	317.5	297.6	288.6	252.6
Domestic output (+):[7]						
From home-grown cattle	....do....	222.7	229.3	224.8	222.5	231.2
From exported live cattle	....do....	0	0	0	0	0
Gross domestic output	....do....	222.7	229.3	224.8	222.5	231.2
Imports (+):						
Live cattle & calves	....do....	108.0	88.2	72.8	66.1	21.4
Fresh, chilled or frozen	....do....	17.1	18.3	10.4	29.4	19.1
Canned & preserved	....do....	(8)	(8)	(8)	(8)	(8)
Total imports	....do....	125.1	106.5	83.2	95.5	40.5
Exports (-):						
Live cattle & calves	....do....	0	0	0	0	0
Fresh, chilled or frozen	....do....	0	0	0	0	0
Canned & preserved	....do....	0	0	0	0	0
Total exports	....do....	0	0	0	0	0
Consumption:						
Total	....do....	347.8	335.8	308.0	318.0	271.7
Per capita	Pounds	44.4	41.7	37.5	37.8	31.6
Human population	1,000	7,827	8,050	8,222	8,412	8,600

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Negligible.

Nearly all of Chile's beef imports come from Argentina -- mainly in the form of live cattle and calves but also as dressed meat. In 1965, imports of slaughter cattle were substantially reduced -- to an estimated 70,000 head from 120,000 in 1964 -- as a result of various factors. During July, the Argentine Government restricted cattle shipments to Chile; in August, the border was closed by storms and heavy snow. Later, in order to conserve beef supplies and foreign exchange, Chile limited retail beef sales to only Friday and Saturday of each week. As a result, production and consumption were considerably below 1964 levels.

In an effort to narrow the beef-deficiency gap by expanding the domestic cattle industry, Chile has been utilizing a $19 million loan from the International Bank for Reconstruction and Development (IBRD) to grant credits for the purchase of breeding livestock. During 1965, about 11,000 purebred cattle were imported.

PERU

In South America -- where most people imagine all countries as surplus beef producers and exporters -- Peru (like Chile) stands out as an importer of beef and slaughter cattle. Per capita beef consumption -- at around 15 pounds in recent years -- is one of the lowest levels on the Continent.

Domestic output from home-grown cattle declined between 1961 and 1963 while imports of live slaughter cattle -- mainly from Argentina and Ecuador -- advanced sharply.

Table 16.--PERU: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	3,132	3,242	3,326	3,466	3,625
Imported[4]	....do...	30	99	128	47	46
Exported[4]	....do...	0	0	0	0	0
Slaughtered[5]	....do...	(6)	(6)	(6)	(6)	(6)
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	161.5	191.5	211.0	200.4	187.6
Domestic output (+):[8]						
From home-grown cattle	....do...	147.8	147.1	153.3	179.1	167.6
From exported live cattle	....do...	0	0	0	0	0
Gross domestic output	....do...	147.8	147.1	153.3	179.1	167.6
Imports (+):						
Live cattle & calves	....do...	13.7	44.4	57.7	21.3	20.0
Fresh, chilled or frozen	....do...	5.2	8.1	9.7	9.0	9.0
Canned & preserved	....do...	.8	.3	.3	.1	.1
Total imports	....do...	19.7	52.8	67.7	30.4	29.1
Exports (-):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total exports	....do...	0	0	0	0	0
Consumption:						
Total	....do...	167.5	199.9	221.0	209.5	196.7
Per capita	Pounds	15.0	17.4	18.6	17.2	15.7
Human population	1,000	11,180	11,511	11,854	12,190	12,490

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] Not available. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

In 1964, domestic beef output increased substantially to compensate for sharply reduced imports caused by higher prices and smaller availabilities in supplying countries. Improved weather and pasture conditions during 1965 resulted in reduced slaughtering and beef output as producers were encouraged to rebuild herds.

The Peruvian Government places a high priority on the development and expansion of the livestock industry. Programs for importation of purebred breeding stock and for other improvements are already underway.

URUGUAY

The world's leading beef eaters live in Uruguay and Argentina where per capita consumption levels range from 150 pounds to 190 pounds yearly. In 1964, Uruguay's 164-pound level was highest in the world.

Uruguay also is a major world beef exporter. In 1964, she ranked fourth and supplied 7 percent of total world exports. In recent years, 30 percent-40 percent of her total beef production has been exported. Both output and exports have grown steadily. Record high levels were reached in 1964, when production was up 15 percent from that of the previous year and 40 percent from 1961; exports were nearly two-and-a-half times larger than in 1961.

Table 17.--URUGUAY: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	8,680	8,516	8,617	8,719	8,100
Imported[4]	....do...	0	0	0	0	0
Exported[4]	....do...	1	14	1	1	8
Slaughtered[5]	....do...	1,168	1,220	1,462	1,641	1,605
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	581.2	600.2	707.4	812.5	747.6
Domestic output (+):[7]						
From home-grown cattle	....do...	581.2	600.2	707.4	812.5	747.6
From exported live cattle	....do...	.3	6.7	.3	.7	3.8
Gross domestic output	....do...	581.5	606.9	707.7	813.2	751.4
Imports (+):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total imports	....do...	0	0	0	0	0
Exports (-):						
Live cattle & calves	....do...	.3	6.7	.3	.7	3.8
Fresh, chilled or frozen	....do...	89.8	121.6	149.1	266.8	153.2
Canned & preserved	....do...	46.3	60.4	64.5	55.2	70.8
Total exports	....do...	136.4	188.7	213.9	322.7	227.8
Consumption:						
Total	....do...	445.1	418.2	493.8	471.9	523.6
Per capita	Pounds	156.6	146.5	172.0	163.9	181.2
Human population	1,000	2,841	2,855	2,870	2,880	2,890

[1] Provisional. [2] Estimated. [3] June. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

Last year, beef production was down 8 percent as a result of a severe drought beginning in the latter months of 1964 and continuing through April 1965. Poor grazing conditions and parched grasslands provided little feed. By the end of 1965, pasture conditions had improved considerably. For the year as a whole, however, smaller beef supplies were available for export. In fact, 1965 beef exports were 30 percent less than the previous year's record high level. Exports of chilled and frozen beef -- mainly to Spain, then West Germany, Netherlands, Italy, and France -- were 43 percent lower than in 1964. Canned corned beef exports -- principally to the United States -- were up somewhat in 1965.

WESTERN EUROPE

DENMARK

Danish beef and veal production -- like that of most European cattle systems today -- is based primarily on a dairy industry, the main purpose of which is to produce milk. The scarcity of extensive rangeland and high feed grain costs render it relatively less economical to graze and feed beef-type cattle for meat than to grow dairy-type cattle for milk under more intensive conditions. Fully two-thirds of Denmark's total beef and veal output is derived from dairy calves not entering the herd and from cull dairy cows being retired from the herd.

Nevertheless, Denmark is a major supplier of live cattle and dressed beef to many deficit-producing countries of Western Europe.

One-and-a-half to two times more Danish beef enters world trade -- either as meat or as live animals -- than is consumed domestically. In 1964, exports amounted to 301 million pounds compared with 170 million pounds consumed in Denmark. Roughly 45 percent of exports were in the form of live cattle and calves; the remainder was primarily dressed carcass beef.

Denmark's principal export outlet for dressed beef is Italy; following are West Germany, East Germany, Switzerland and neighboring Scandinavian countries. Live cattle shipments go primarily to West Germany, followed by Italy, Netherlands, and Switzerland.

In 1964, Danish beef production dropped 11 percent, after an upward movement since 1961. Smaller available supplies resulted in a 29 percent decline in beef exports, compared with the record high 1963 level.

In 1965, output showed no material change from the preceding year. Exports of live slaughter cattle and calves increased slightly -- from 255,000 head in 1964 to 277,000 in 1965. A 20 percent gain in exports to West Germany offset moderate declines in shipments to secondary live cattle outlets, Italy, Netherlands, and Belgium. Dressed beef exports dropped moderately to 140 million pounds in 1965 from 155 million in 1964. Prices paid to Danish cattlemen averaged 5 percent higher last year than in 1964.

Table 18.--DENMARK: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	3,358	3,461	3,393	3,197	3,183
Imported[4]	....do...	(5)	(5)	(5)	(5)	(5)
Exported[4]	....do...	364	289	335	255	277
Slaughtered[6]	....do...	925	1,161	1,199	986	996
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	301.8	377.9	380.7	339.9	337.3
Domestic output (+):[8]						
From home-grown cattle	....do...	301.8	377.9	380.7	339.9	337.3
From exported live cattle	....do...	163.8	149.2	173.7	130.7	136.9
Gross domestic output	....do...	465.6	527.1	554.4	470.6	474.2
Imports (+):						
Live cattle & calves	....do...	(5)	(5)	(5)	(5)	(5)
Fresh, chilled or frozen	....do...	.2	.3	.2	.2	.2
Canned & preserved	....do...	(5)	.1	.1	(5)	.1
Total imports	....do...	.2	.4	.3	.2	.3
Exports (-):						
Live cattle & calves	....do...	163.8	149.2	173.7	130.7	136.9
Fresh, chilled or frozen	....do...	111.8	171.5	210.1	155.3	140.8
Canned & preserved	....do...	28.3	30.0	31.3	14.9	22.0
Total exports	....do...	303.9	350.7	415.1	300.9	299.7
Consumption:						
Total	....do...	161.9	176.8	139.6	169.9	174.8
Per capita	Pounds	35.2	38.1	29.8	36.0	36.8
Human population	1,000	4,600	4,637	4,681	4,718	4,756

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

EUROPEAN ECONOMIC COMMUNITY (EEC)

EEC policy concerning beef -- as set forth in the Common Agricultural Policy (CAP) Beef Regulation implemented in November 1964 -- is aimed at achieving self-sufficiency within the Community of six countries in beef production. To attain this goal, a variable import levy system was developed in an effort to limit the price-depressing influence that could be exerted by uncontrolled imports of beef and cattle. An import levy -- either at the full rate or one-half -- is imposed when domestic cattle prices fall below 105 percent of established orientation prices. These prices are set at levels that will encourage expansion of the domestic cattle industry yet permit sufficient imports to satisfy existing deficit requirements and maintain relative price stability. In the latter half of 1965, domestic market price reductions were sufficient to necessitate the imposition of import levies in the Netherlands, Belgium, and France.

In recent years, the EEC has become a substantial net importer of beef and veal. Production has lagged. Consumption of beef has surged upward, as a result of rapid overall economic growth and rising incomes. Prices rose sharply to new postwar highs in late 1963. They continued upward in 1964 and were sustained at high levels through October 1965, when some seasonal slackening was noted. New supply sources were established in order to fill the widening gap.

The number of cattle and calves on EEC farms declined 3 percent between 1961 and 1964; this situation reflected exceptionally heavy slaughter stimulated by weather adversities and feed scarcities during 1962 and 1963. Subsequent cattle shortages and the beginning of herd rebuilding resulted in an 8 percent reduction in slaughter numbers during 1964 compared with the previous year. Beef production was increasing through 1963, then dropped by 7 percent in 1964. Cattle inventories leveled off during 1964 and turned slightly upward by early 1965 in all EEC countries. Slaughter and beef production in 1965 for the EEC as a whole declined 3 percent and 1 percent, respectively, from 1964's reduced levels. Slight production increases in France and the Netherlands were more than offset by moderate declines in Italy, West Germany, and Belgium.

During 1964 and 1965, wholesale prices for carcass beef ranged from around 48 cents a pound to as high as 68 cents a pound among the various EEC markets. Milan prices consistently topped the list; after Milan's came Brussels' and Hamburg's. Prices in Paris and Rotterdam were generally lower than in the other three markets. Except in Rotterdam, 1965 monthly average prices were generally above 1964 levels with some slackening noted in the last quarter because of heavier-than-usual seasonal slaughter.

Attractive prices and unsatisfied appetites in 1964 spurred the EEC's already increasing beef imports. An alltime high was reached. Two-and-a-half times more total beef, as meat and as live cattle and calves, was imported from outside the Community than in 1961. Compared with 1963, total imports were up 37 percent. Imports of fresh, chilled, or frozen beef -- comprising 67 percent of the total 1964 beef import equivalent -- were up 41 percent from 1963 levels. The beef equivalent of imported live cattle and calves -- 28 percent of the 1964 total -- was nearly 30 percent higher than in 1963. Processed beef -- comprising the remaining 5 percent of total imports -- was up nearly 50 percent.

In 1964 and in 1965, gross EEC output of beef made up only 86 percent of total consumption. The remainder was imported -- either as meat or as live animals. In the three preceding years, gross EEC output was equivalent to 90-95 percent of EEC consumption. Imports have played an increasingly important role in EEC beef consumption. Beef imports as a percentage of total consumption increased from 6 percent in 1961 to around 15 percent in 1964 and 1965.

Principal sources for imported dressed beef and live cattle and calves are Ireland, Denmark, the United Kingdom, Yugoslavia, Hungary, and Poland. Argentina, Uruguay, Australia, and New Zealand became more significant supply sources for dressed and processed beef in 1964 and 1965.

Table 19.--EUROPEAN ECONOMIC COMMUNITY:[1] Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[2]	1965[3]
Live Cattle & Calves (numbers):						
On farms[4]	1,000 hd.	48,065	49,601	49,177	48,002	48,332
Imported[5]	....do...	628	600	842	812	933
Exported[5]	....do...	49	27	38	24	11
Slaughtered[6]	....do...	21,888	23,296	22,712	20,916	20,206
Beef & Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	8,297.7	8,829.1	8,937.4	8,272.6	8,202.8
Domestic output (+):[8]						
From home-grown cattle	....do...	8,014.4	8,560.4	8,642.0	7,894.1	7,749.8
From exported live cattle	....do...	16.3	7.1	16.2	10.8	6.0
Gross domestic output	....do...	8,030.7	8,567.5	8,658.2	7,904.9	7,755.8
Imports (+):						
Live cattle & calves	....do...	283.3	268.7	295.4	378.5	453.0
Fresh, chilled or frozen	....do...	228.0	332.0	640.4	901.2	798.0
Canned & preserved	....do...	31.1	34.4	38.4	57.3	38.0
Total imports	....do...	542.4	635.1	974.2	1,337.0	1,289.0
Exports (-):						
Live cattle & calves	....do...	16.3	7.1	16.2	10.8	6.0
Fresh, chilled or frozen	....do...	106.3	229.5	136.0	48.7	23.0
Canned & preserved	....do...	71.2	58.9	27.3	32.4	52.0
Total exports	....do...	193.8	295.5	179.5	91.9	81.0
Consumption:						
Total	....do...	8,379.3	8,907.1	9,452.9	9,150.0	8,963.8
Per capita	Pounds	48.3	50.4	52.9	50.9	49.6
Human population	1,000	173,642	176,670	178,518	179,730	180,778

[1] The European Economic Community (EEC) is comprised of Belgium-Luxembourg, France, Federal Republic of Germany, Italy, and the Netherlands; these data exclude intra-EEC trade. [2] Provisional. [3] Estimated. [4] Beginning of year. [5] Excluding cattle for breeding. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

In 1965, EEC imports of beef and veal from outside the Community were 4 percent below the preceding year's record high level -- more live cattle and calves but less in the form of meat. This was mainly a result of reduced world export availabilities. Demand for beef showed no sign of weakening, even though both total and per capita beef consumption fell off slightly. Relatively high prices and an abundance of pork tended to discourage larger consumption of beef in 1965 as it did in the preceding year. Increased supplies -- both domestic and available for import -- in 1966 are expected to result in a resumption of the upward movement in EEC beef consumption.

Belgium-Luxembourg

Per capita beef consumption in Belgium -- at around 50 to 60 pounds in recent years -- is second highest in Europe (France leads with about 70 pounds yearly). Belgium both imports and exports beef and live slaughter cattle and calves, depending on the domestic supply situation in any given year. On a net basis, however, more beef is imported than is exported. Total consumption in recent years has exceeded domestic production by 5-8 percent.

Record-high output in 1963 was caused by unusually heavy slaughter, induced by feed scarcities resulting from weather adversities. Exports and consumption also reached new highs but were followed by sharp declines in 1964, when domestic production fell off 11 percent. Imports of live slaughter cattle -- mainly from the United Kingdom and Ireland -- advanced from 5,000 head in 1963 to 81,000 in 1964.

Table 20.--BELGIUM-LUXEMBOURG: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd..	2,684	2,798	2,847	2,641	2,685
Imported[4]	....do....	12	7	5	81	57
Exported[4]	....do....	7	13	83	26	21
Slaughtered[5]	....do....	977	1,048	1,159	991	950
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs..	449.7	482.8	590.8	526.9	511.5
Domestic output (+):[7]						
From home-grown cattle	....do....	443.7	479.5	587.5	478.4	479.5
From exported live cattle	....do....	3.3	6.0	27.8	8.8	4.5
Gross domestic output	....do....	447.0	485.5	615.3	487.2	484.0
Imports (+):						
Live cattle & calves	....do....	6.0	3.3	3.3	48.5	32.0
Fresh, chilled or frozen	....do....	27.6	37.3	44.9	50.3	35.3
Canned & preserved	....do....	5.5	.9	.9	6.8	([8])
Total imports	....do....	39.1	41.5	49.1	105.6	67.3
Exports (-):						
Live cattle & calves	....do....	3.3	6.0	27.8	8.8	4.5
Fresh, chilled or frozen	....do....	.4	4.6	23.8	6.6	4.6
Canned & preserved	....do....	1.1	1.5	2.6	4.0	4.0
Total exports	....do....	4.8	12.1	54.2	19.4	13.1
Consumption:						
Total	....do....	481.3	514.9	610.2	573.4	538.2
Per capita	Pounds	50.6	53.8	63.2	58.9	55.6
Human population	1,000	9,509	9,574	9,614	9,660	9,685

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Not yet available.

In 1965, domestic output declined a further 3 percent. Compared with the previous year, total beef imports also were off significantly, resulting in further reduced consumption levels.

France

French per capita beef consumption, at about 70 pounds annually, is the highest in Europe. Still, the French cattle industry -- largest in Western Europe -- produces more than sufficient beef to satisfy total domestic requirements. The remainder is exported -- mainly to West Germany as dressed beef and to Italy as live cattle and calves. France ranked fifth as a world beef exporter in 1964 and accounted for just over 4 percent of total global exports.

The meat equivalent of exported live cattle and calves accounted for 19 percent of France's total beef exports in 1964. Two-thirds was fresh, chilled or frozen; and the remaining 15 percent was processed beef. About 85,000 live cattle and calves -- roughly four-fifths of the total exports -- were shipped to Italy. Over two-thirds of the dressed beef was exported to West Germany.

France also is a substantial importer of beef, ranking sixth and accounting for 4 percent of total world imports in 1964. That year, beef imports -- stimulated by reduced domestic output and relatively high prices -- reached an alltime high. Principal suppliers were the Netherlands and Argentina. Ireland, the United Kingdom, Denmark, West Germany, Yugoslavia, and Australia were also significant sources.

Table 21.--FRANCE: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	19,436	20,583	20,265	20,147	20,240
Imported[4]	....do...	9	29	32	14	6
Exported[4]	....do...	105	81	143	107	204
Slaughtered[5]	....do...	10,460	10,886	10,517	9,479	9,475
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	3,538.4	3,672.9	3,613.3	3,401.6	3,483.3
Domestic output (+):[7]						
From home-grown cattle	....do...	3,536.2	3,664.1	3,604.5	3,399.2	3,481.3
From exported live cattle	....do...	39.7	28.7	50.7	48.7	63.4
Gross domestic output	....do...	3,575.9	3,692.8	3,655.2	3,447.9	3,544.7
Imports (+):						
Live cattle & calves	....do...	2.2	8.8	8.8	2.4	2.0
Fresh, chilled or frozen	....do...	26.5	22.0	81.6	175.2	159.4
Canned & preserved	....do...	([8])	([8])	4.4	([8])	([8])
Total imports	....do...	28.7	30.8	94.8	177.6	161.4
Exports (-):						
Live cattle & calves	....do...	39.7	28.7	50.7	48.7	63.4
Fresh, chilled or frozen	....do...	231.5	343.9	227.1	162.2	153.7
Canned & preserved	....do...	46.3	37.5	37.5	36.9	36.0
Total exports	....do...	317.5	410.1	315.3	247.8	253.1
Consumption:						
Total	....do...	3,287.1	3,313.5	3,434.7	3,377.7	3,453.0
Per capita	Pounds	71.9	71.4	72.2	70.2	71.5
Human population	1,000	46,425	47,573	47,840	48,070	48,300

[1] Provisional. [2] Estimated. [3] October of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Negligible.

In 1964, production of beef fell 6 percent from the previous year, as a result of herd rebuilding following heavy 1962 and 1963 slaughterings. Exports were off 21 percent. Imports nearly doubled from the already high 1963 level. Consumption was off moderately.

In 1965, French beef production began to recover as the cattle cycle passed its low point. Output increased about 3 percent. Prices were above 1964 levels until October, when they fell low enough to activate, automatically, the EEC levies at 50 percent on imports from third-countries. Beef imports -- though still running at a high level -- fell off sharply in the latter half of 1965, for an overall yearly decline of 9 percent from the record high 1964 level. Exports of live cattle and calves nearly doubled, with heavy shipments moving to Italy. Consumption rose slightly.

Germany, Federal Republic of

As second largest beef producer in Western Europe and fourth largest world importer, West Germany absorbs a sizeable share of the world beef supply. Of the total West German beef supply available for consumption, 15-20 percent is typically imported -- either as meat or in the form of live animals.

In 1964, production of beef was off 3 percent from the previous year's record high output caused by unusually heavy slaughter stimulated by 1962-63 weather adversities. Consumption fell off slightly. Total imported beef was up 31 percent; 29 percent more fresh, chilled and frozen was taken, and 41 percent more processed beef.

In recent years, imported live cattle and calves have accounted for one-third to one-half of West Germany's total beef import equivalent. Dressed beef -- the principal component -- has comprised around 50 percent, while processed beef imports have made up 5 percent to 10 percent of the total beef import equivalent.

West Germany's principal supply sources for dressed beef are France, Argentina, Uruguay, Ireland, Netherlands, and Denmark. Live cattle are purchased mainly from Denmark, Ireland, Hungary, Poland, Sweden, France, and Austria; imports from the United Kingdom increased substantially in 1965.

Peak price levels reached in the spring of 1965 tapered off noteably by the end of the year, reflecting much heavier seasonal slaughter in the fall. Beef production, however, was 4 percent below 1964 as continued herd rebuilding limited slaughtering for the year as a whole. Imports of beef and live cattle were above 1964 levels by more than one-third. Cattle inventories expanded by 5 percent during 1965, suggesting a 10-15 percent increase in beef output for 1966.

Table 22.--FEDERAL REPUBLIC OF GERMANY: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	12,872	13,281	13,355	13,014	13,053
Imported[4]	....do....	418	351	344	310	508
Exported[4]	....do....	([5])	([5])	8	19	1
Slaughtered[6]	....do....	5,232	5,690	5,970	5,832	5,375
Beef and Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	2,327.7	2,505.5	2,595.5	2,508.8	2,407.4
Domestic output (+):[8]						
From home-grown cattle	....do....	2,105.0	2,315.0	2,416.0	2,323.7	2,103.2
From exported live cattle	....do....	([5])	([5])	3.8	4.8	.2
Gross domestic output	....do....	2,105.0	2,315.0	2,419.8	2,328.5	2,103.4
Imports (+):						
Live cattle and calves	....do....	222.7	190.5	179.5	185.1	304.2
Fresh, chilled or frozen	....do....	184.5	232.6	200.8	259.3	308.8
Canned and preserved	....do....	29.9	29.5	38.1	53.8	50.0
Total imports	....do....	437.1	452.6	418.4	498.2	663.0
Exports (-):						
Live cattle and calves	....do....	([5])	([5])	3.8	4.8	.2
Fresh, chilled or frozen	....do....	23.7	27.6	27.6	23.4	10.0
Canned and preserved	....do....	2.5	1.5	1.5	2.9	([5])
Total exports	....do....	26.2	29.1	32.9	31.1	10.2
Consumption:						
Total	....do....	2,515.9	2,738.5	2,805.3	2,795.6	2,756.2
Per capita	Pound	44.8	48.0	48.7	48.1	47.2
Human population	1,000	56,175	56,938	57,606	58,049	58,400

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

Italy

Rapid postwar economic growth characterizing Western Europe was especially obvious in Italy in the late 1950's and early 1960's. Increased living levels associated with higher incomes spurred Italian demand for beef and veal to new highs each year. Per capita beef consumption -- though lowest of the EEC countries -- peaked in 1963 to 38 pounds, for a 46 percent increase over average 1956-60 levels -- fastest gain in the EEC.

In 1963 and 1964, Italy moved into a solid third-ranking position among the world's leading importers of beef and veal. Mounting domestic demand outpaced lagging production increases until 1963, when output actually turned downward as a result of forced slaughterings in the previous year which reduced cattle inventories and slaughter availabilities. Drought in 1962 and the severe winter of 1962-63 reduced feed supplies. Domestic output declined further in 1964 and again in 1965. Prices reached peak levels -- the highest in Western Europe. Sharply increased imports became necessary in order to satisfy Italy's growing demand.

Table 23.--ITALY: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	9,845	9,551	9,189	8,974	9,037
Imported[4]	....do....	353	295	771	575	685
Exported[4]	....do....	(5)	(5)	(5)	(5)	(5)
Slaughtered[6]	....do....	3,904	4,130	3,170	3,112	2,940
Beef and Veal (Carcass Wgt. Equiv.):						
Production[7]	Mil. lbs.	1,452.8	1,552.0	1,424.2	1,263.2	1,212.5
Domestic output (+):[8]						
From home-grown cattle	....do....	1,366.4	1,447.3	1,165.4	1,092.3	1,034.3
From exported live cattle	....do....	(5)	(5)	(5)	(5)	(5)
Gross domestic output	....do....	1,366.4	1,447.3	1,165.4	1,092.3	1,034.3
Imports (+):						
Live cattle and calves	....do....	86.4	104.7	258.8	170.9	178.2
Fresh, chilled or frozen	....do....	118.6	208.8	569.0	625.2	562.2
Canned and preserved	....do....	7.1	9.3	1.1	.7	11.3
Total imports	....do....	212.1	322.8	828.9	796.8	751.7
Exports (-):						
Live cattle and calves	....do....	(5)	(5)	(5)	(5)	(5)
Fresh, chilled or frozen	....do....	.4	.2	.2	.2	.1
Canned and preserved	....do....	8.6	9.7	8.2	9.0	12.2
Total exports	....do....	9.0	9.9	8.4	9.2	12.3
Consumption:						
Total	....do....	1,569.5	1,760.2	1,985.9	1,879.9	1,773.7
Per capita	Pounds	31.0	34.4	38.3	36.3	34.0
Human population	1,000	49,812	50,695	51,491	51,816	52,123

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Negligible. [6] Total of home-grown and imported, farm and commercial. [7] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [8] Excluding meat equivalent of imported live animals.

Beef imports -- as live cattle and in the form of meat -- have comprised over 40 percent of the net supply available for consumption each year since 1963. This compares with around 15 percent in the two preceding years.

In 1964, total beef imports were nearly four times larger than in 1961. The meat equivalent of imported live cattle and calves was nearly doubled. Imports of fresh, chilled and frozen beef were over five times larger than in 1961. Of the total imported beef and veal, 79 percent was fresh, chilled and frozen compared with 56 percent in 1961. Imported live cattle -- though up in numbers -- have comprised a declining relative share of the total beef import equivalent.

Italy's principal traditional sources of supply for dressed beef and veal are Argentina, Denmark, Yugoslavia, and the Netherlands. Live cattle and calves are customarily imported from various Eastern and Western European countries. In 1964 and 1965, Australia and New Zealand found a new outlet in Italy for frozen beef and veal. The nominal purchase of feeder cattle and baby calves from the United States -- begun in 1964 -- was continued in 1965.

In 1965, production of beef and veal declined further -- about 5 percent -- for the third year in a row. Imports of dressed beef were slightly below the record 1964 level. Live cattle imports totaled 685,000 head -- up roughly 19 percent from 1964. Consumption was off slightly, as a result of high retail beef prices throughout most of 1965.

Netherlands

Holland's big dairy industry supplies more than sufficient beef and veal than is necessary to satisfy total Dutch requirements. In keeping with tradition, trading-minded Dutchmen both import and export beef and cattle. The Netherlands ranks in the Top Ten among the world's importers, as well as exporters, of beef and veal. Traditionally, more is exported than is imported.

Production of beef and veal in the Netherlands fell off sharply in 1964 as a result of herd rebuilding efforts following record-high slaughter encouraged by feed scarcities in 1963. Imports of cattle and beef increased substantially to compensate for the existing shortage. Exports of veal -- stimulated by high prices -- also increased while live cattle shipments fell off. The net effect of these supply changes was a sharp drop in per capita consumption and a marked increase in prices.

Dutch cattle imports in 1964 totaled 118,000 head compared with about 31,000 in 1963. The majority of these cattle were imported from the United Kingdom. Other important sources for live cattle imports were Denmark, Belgium, and Ireland. In response to high prices, Dutch imports of dressed beef -- primarily from Argentina -- also rose markedly.

Dutch exports of calves -- primarily to France and Italy -- were down sharply in 1964. Price relationships were such that it was more economical for these calves to be slaughtered in the Netherlands so the veal could be exported to these same countries.

With high-priced beef in short supply and pork in ample supply, Dutch per capita consumption of beef and veal fell off considerably, from 50 pounds in 1963 to 38 pounds in 1964.

Table 24.--NETHERLANDS: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	3,228	3,388	3,521	3,226	3,317
Imported[4]	....do....	50	46	31	118	81
Exported[4]	....do....	142	69	78	47	71
Slaughtered[5]	....do....	1,315	1,542	1,896	1,502	1,466
Beef and Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	529.1	615.9	713.6	572.1	588.1
Domestic output (+):[7]						
From home-grown cattle	....do....	505.3	594.1	699.0	516.2	552.8
From exported live cattle	....do....	29.5	16.1	21.6	15.6	22.1
Gross domestic output	....do....	534.8	610.2	720.6	531.8	574.9
Imports (+):						
Live cattle and calves	....do....	23.8	21.8	14.6	55.9	35.3
Fresh, chilled or frozen	....do....	47.6	46.5	39.2	67.3	54.6
Canned and preserved	....do....	3.1	4.2	1.8	13.8	14.5
Total imports	....do....	74.5	72.5	55.6	137.0	104.4
Exports (-):						
Live cattle and calves	....do....	29.5	16.1	21.6	15.6	22.1
Fresh, chilled or frozen	....do....	52.9	78.9	135.8	154.8	157.7
Canned and preserved	....do....	31.7	27.8	19.9	38.3	29.6
Total exports	....do....	114.1	112.8	177.3	208.7	209.4
Consumption:						
Total	....do....	495.2	559.9	598.9	460.1	469.9
Per capita	Pounds	42.6	47.5	50.0	37.9	38.3
Human population	1,000	11,721	11,890	11,967	12,135	12,270

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

The trend toward exporting veal rather than live calves -- evident in 1964 -- continued in 1965. In 1965, beef and veal production increased about 3 percent; more veal but less beef was produced. A seasonal price decline -- the result of heavy late summer and fall slaughterings -- forced prices down and caused variable import levies as provided for under the EEC-Beef Regulation to be imposed. This, in turn, resulted in sharply reduced imports of slaughter cattle which dropped 31 percent from the high 1964 level. Imports of dressed beef declined 19 percent in 1965 -- much less from France and Argentina but significantly more from Brazil, Uruguay, and New Zealand. Exports of baby calves -- mainly to Italy -- increased substantially, while slaughter cattle shipments declined. Exports of dressed beef showed no material change from 1964. The somewhat smaller total available supply in 1965 resulted in continued lower-than-usual consumption.

GREECE

Per capita beef consumption in Greece, though relatively small, has shown a very rapid percentage rise because of higher levels of living. This decade, it has increased from about 9 pounds in 1960 to about 22 in 1964. Although beef production has increased steadily in recent years -- roughly doubling between 1961 and 1964 -- relatively large imports still have been

necessary to satisfy increasing consumption requirements. Over a third of Greece's total beef and veal supply is imported -- mostly in the form of dressed meat.

Argentina is the principal supplier. Other important sources are Yugoslavia, Poland, and Uruguay. New Zealand and Australia became significant supply sources in 1964 and 1965.

Greek policy is in support of expanding the domestic cattle industry. Support prices, direct subsidy payments, and short-term loans are among methods employed in accomplishing this end.

In 1965, domestic output of beef was 7 percent larger than in the previous year resulting, in part, from heavier slaughter weights. Beef imports and per capita consumption were about the same as in 1964.

Table 25.--GREECE: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	1,176	1,076	1,201	1,188	1,180
Imported[4]	....do...	70	43	20	2	10
Exported[4]	....do...	0	0	0	0	0
Slaughtered[5]	....do...	359	409	442	484	504
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	62.6	97.0	111.8	123.4	132.3
Domestic output (+):[7]						
From home-grown cattle	....do...	54.5	92.2	109.6	122.6	131.3
From exported live cattle	....do...	0	0	0	0	0
Gross domestic output	....do...	54.5	92.2	109.6	122.6	131.3
Imports (+):						
Live cattle & calves	....do...	8.1	4.8	2.2	.8	1.0
Fresh, chilled or frozen	....do...	29.1	41.9	68.5	52.8	50.0
Canned & preserved	....do...	4.0	4.0	9.2	12.6	12.0
Total imports	....do...	41.2	50.7	79.9	66.2	63.0
Exports (-):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total exports	....do...	0	0	0	0	0
Consumption:						
Total	....do...	95.7	142.9	189.5	188.8	194.3
Per capita	Pounds	11.4	16.9	22.4	22.2	22.7
Human population	1,000	8,402	8,448	8,480	8,510	8,560

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

IRELAND

In recent years, two-and-a-half times more beef has been produced in Ireland than has been consumed there. The difference has been exported as dressed or processed beef. In addition,

substantial numbers of live cattle and calves are exported for further feeding and slaughter elsewhere. Ireland is an important supplier of beef and live cattle to various beef-deficit markets in Western Europe.

The United Kingdom is Ireland's principal outlet for cattle and for beef. West Germany and other beef-deficit countries on the Continent are other significant markets. Beginning in 1958, the United States became an important outlet for Irish manufacturing-type beef.

A marked reduction in beef exports to the United States was registered in 1964 from 73 million pounds down to 20 million pounds and a still further decline was noted in 1965. Reduced shipments of boneless frozen beef to the United States since 1964 are explained by larger shipments of fresh chilled carcass beef to the more attractive Western European markets.

Live cattle exports -- mostly to the United Kingdom but in increased numbers also to Italy, West Germany, France, and the Netherlands -- have played a primary role in Ireland's trade pattern. Of the total 794,000 head exported in 1964, the United Kingdom purchased 640,000 stocker and feeder cattle and 63,000 fat cattle ready for direct slaughter. In 1965, 25 percent fewer total cattle were exported than in 1964 as a result of herd rebuilding in Ireland.

Table 26.--IRELAND: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	4,241	4,165	4,301	4,369	4,524
Imported[4]	....do...	159	102	140	148	101
Exported[4]	....do...	722	575	662	794	597
Slaughtered[5]	....do...	646	591	604	491	505
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	313.6	276.0	284.3	244.8	247.1
Domestic output (+):[7]						
From home-grown cattle	....do...	236.4	228.4	218.4	171.0	197.7
From exported live cattle	....do...	216.6	172.5	198.6	238.2	179.1
Gross domestic output	....do...	453.0	400.9	417.0	409.2	376.8
Imports (+):						
Live cattle & calves	....do...	77.2	47.6	65.9	73.8	49.4
Fresh, chilled or frozen	....do...	(8)	(8)	(8)	(8)	(8)
Canned & preserved	....do...	(8)	(8)	(8)	(8)	(8)
Total imports	....do...	77.2	47.6	65.9	73.8	49.4
Exports (-):						
Live cattle & calves	....do...	216.6	172.5	198.6	238.2	179.1
Fresh, chilled or frozen	....do...	199.4	165.8	170.2	129.4	131.0
Canned & preserved	....do...	40.3	29.1	26.9	24.9	16.5
Total exports	....do...	456.3	367.4	395.7	392.5	326.6
Consumption:						
Total	....do...	73.9	81.1	87.2	90.5	99.6
Per capita	Pounds	26.3	28.7	30.7	31.8	34.8
Human population	1,000	2,815	2,824	2,841	2,849	2,860

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Negligible.

Cattle number increases have been stimulated by a "cow herd expansion scheme" implemented January 1, 1964. Irish beef production -- traditionally limited by heavy exports of live cattle -- is expected to be stimulated by a "fat-cattle slaughter subsidy scheme" implemented February 1, 1965.

Larger beef exports -- as meat rather than in the form of live animals -- is the committed goal of the Irish government.

In 1964, however, Irish packers and farmers slaughtered fewer cattle and calves than in any year since 1958. Beef and veal production amounted to 245 million pounds -- 14 percent less than 1963 and 22 percent below the 1961 record high. In 1965, production showed no substantial change from the previous year. Cow herd rebuilding and continued heavy exports of live cattle have had a limiting effect on Ireland's domestic beef production.

SPAIN

Increased purchasing power and higher living levels have spurred demand for beef and stimulated a need for larger imports to fill the deficit between domestic production and consumption. Spanish per capita consumption of beef -- at around 17 pounds in recent years -- is among the lowest in Europe but has risen at one of the fastest rates.

Table 27.--SPAIN: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	3,640	3,768	3,683	3,670	3,723
Imported[4]	....do....	1.6	.4	1.4	([5])	([6])
Exported[4]	....do....	1.0	.8	1.5	1	([6])
Slaughtered[7]	....do....	1,231	1,121	1,180	1,500	1,142
Beef and Veal (Carcass Wgt. Equiv.)						
Production[8]	Mil. lbs.	392.4	359.4	379.2	496.0	390.2
Domestic output (+):[9]						
From home-grown cattle	....do....	391.7	359.2	378.6	495.8	390.0
From exported live cattle	....do....	.4	.3	.7	.5	([6])
Gross domestic output	....do....	392.1	359.5	379.3	496.3	390.2
Imports (+):						
Live cattle and calves	....do....	.7	.2	.6	.2	([6])
Fresh, chilled or frozen	....do....	8.2	93.8	183.5	42.6	142.4
Canned and preserved	....do....	2.4	3.2	5.5	7.3	14.7
Total imports	....do....	11.3	97.2	189.6	50.1	157.1
Exports (-):						
Live cattle and calves	....do....	.4	.3	.7	.5	([6])
Fresh, chilled or frozen	....do....	.2	.8	([5])	.2	.1
Canned and preserved	....do....	.6	.3	.1	.1	.2
Total exports	....do....	1.2	1.4	.8	.8	.3
Consumption:						
Total	....do....	402.2	455.5	568.1	545.6	547.0
Per capita	Pounds	13.1	14.7	18.2	17.3	17.2
Human population	1,000	30,688	30,947	31,208	31,472	31,737

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Negligible. [6] Not yet available. [7] Total of home-grown and imported, farm and commercial. [8] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [9] Excluding meat equivalent of imported live animals.

In contrast to 1964 production declines in most other European countries, Spanish beef output was 29 percent larger than in 1963. Imports were only about one-fourth as large as the record high level purchased the previous year, partly as a result of high prices and reduced world export availabilities. Consumption was off moderately.

Spain's principal source of supply for dressed beef is Argentina. Also significant as suppliers are France, Denmark, Netherlands, Belgium, and Uruguay.

In 1965, Spanish beef production declined 20 percent from the previous year's record output as a result of herd rebuilding. Imports were over three times more than 1964's reduced level, causing consumption to remain relatively steady.

SWITZERLAND

Alpine cattlemen have developed a highly refined dairy industry which also provides Switzerland with 80-85 percent of its total beef consumption requirements. The remaining 15-20 percent needs to be imported.

In 1964, a 4 percent reduction in domestic output resulted in heavier-than-usual imports. Beef and veal imports roughly doubled from the previous year. About 25 percent of total 1964 consumption was imported dressed and processed beef and veal -- mainly from Denmark, Netherlands, France, Argentina, and certain East European countries. An additional 5 percent was derived from imported live cattle and calves.

Beef output was off moderately in 1965 as were imports and consumption.

Table 28.--SWITZERLAND: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle and Calves (numbers):						
On farms[3]	1,000 hd.	1,761	1,782	1,716	1,698	1,773
Imported[4]	....do....	11.0	10.5	15.2	32.1	34.4
Exported[4]	....do....	3.9	4.3	7.7	3.6	2.0
Slaughtered[5]	....do....	786	830	841	778	770
Beef and Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	233.3	260.6	253.5	242.5	240.0
Domestic output (+):[7]						
From home-grown cattle	....do....	228.7	256.0	246.3	225.8	222.8
From exported live cattle	....do....	2.3	2.5	4.6	2.1	1.1
Gross domestic output	....do....	231.0	258.5	250.9	227.9	223.9
Imports (+):						
Live cattle and calves	....do....	4.6	4.6	7.6	17.2	17.2
Fresh, chilled or frozen	....do....	37.8	46.8	36.9	75.0	64.2
Canned and preserved	....do....	5.4	6.3	7.7	8.5	8.5
Total imports	....do....	47.8	57.7	52.2	100.7	89.9
Exports (-):						
Live cattle and calves	....do....	2.3	2.5	4.6	2.1	1.1
Fresh, chilled or frozen	....do....	(8)	(8)	(8)	.3	.2
Canned and preserved	....do....	7.8	8.1	8.2	6.7	6.7
Total exports	....do....	10.1	10.6	12.8	9.1	8.0
Consumption:						
Total	....do....	268.7	305.6	290.3	319.5	305.8
Per capita	Pounds	48.9	54.1	50.9	55.1	52.3
Human population	1,000	5,500	5,650	5,700	5,825	5,850

[1] Provisions. [2] Estimated. [3] April. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals. [8] Negligible.

UNITED KINGDOM

Until 1962, the United Kingdom consistently topped the list of leading world beef importers. Since then, she has been running a close second to the United States. One-fourth of total world imports in 1964 moved into the United Kingdom. Total U.K. imports have been somewhat smaller in recent years than in the 1956-60 period because domestic production has risen moderately. Still, beef imports -- either as meat or in the form of live cattle and calves -- comprise around 50 percent of total U.K. consumption.

U.K. dressed beef imports increased 24 percent between 1961 and 1964. In 1964, the major supplier continued to be Argentina; however, Australia and New Zealand supplied much larger quantities than in previous years. It is puzzling to most observers that the United Kingdom can maintain considerably lower beef prices than the EEC countries. This is largely explained by differences in import duties. Even at the lower price level, imports are attracted although at lesser amounts.

In 1964, the United Kingdom exported about 306,000 head of non-breeding cattle, an increase from 162,000 in 1963. The majority of this increase was accounted for by shipments to the Netherlands, Belgium, and West Germany even though Ireland continued to be the largest importer of U.K. cattle. These are primarily cattle from Northern Ireland reflecting movement within an integrated livestock economy rather than a supply shortage in Ireland.

The United Kingdom imports both feeder and slaughter cattle. Feeder cattle are normally fattened for about four months in the United Kingdom before slaughter. U.K. imports of cattle increased steadily between 1962 and 1964. The majority of U.K. cattle imports are Irish feeder cattle.

With reduced supplies, caused by a decrease in cattle slaughter, per capita consumption in 1964 -- at 56 pounds -- was 4 pounds less than the 60 pounds registered in 1963. A further decline of 6-pounds occurred in 1965.

United Kingdom beef production, which had been advancing under government subsidy, fell off sharply in 1964. Although cattle imports from Ireland increased, cattle exports to Europe more than offset these increases, resulting in reduced domestic availabilities.

In 1965, U.K. beef production decreased a further 5 percent as herd rebuilding continued. Live cattle imports amounted to 511,000 head -- down 28 percent from 1964. Imports of beef were 18 percent smaller than the previous year. Argentina continued to be the major supplier but its share of the total became smaller; declines were also noted in imports from Uruguay, Brazil, and Yugoslavia. On the other hand, Australia and New Zealand increased their shares; shipments were 8 and 14 percent, respectively, larger than 1964. Bechuanaland, South Africa, and Ireland also shipped more to the United Kingdom.

Exports of live cattle -- considerably more to West Germany and fewer to Netherlands and Belgium -- amounted to 325,000 head in 1965 -- up 6 percent from 1964.

Table 29.--UNITED KINGDOM: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	11,618	11,604	11,438	11,686	12,000
Imported[4]	....do...	685	563	633	706	511
Exported[4]	....do...	184	116	162	306	325
Slaughtered[5]	....do...	4,255	4,264	4,247	3,853	3,582
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	2,019.8	2,024.0	2,081.4	1,931.3	1,835.5
Domestic output (+):[7]						
From home-grown cattle	....do...	1,595.3	1,675.5	1,689.0	1,497.0	1,525.2
From exported live cattle	....do...	114.2	72.1	100.4	184.9	197.1
Gross domestic output	....do...	1,709.5	1,747.6	1,789.4	1,681.9	1,722.3
Imports (+):						
Live cattle & calves	....do...	424.5	348.5	392.4	434.3	310.3
Fresh, chilled or frozen	....do...	668.4	761.4	826.1	830.7	715.1
Canned & preserved	....do...	371.8	373.4	330.2	302.4	219.0
Total imports	....do...	1,464.7	1,483.3	1,548.7	1,567.4	1,244.4
Exports (-):						
Live cattle & calves	....do...	114.2	72.1	100.4	184.9	197.1
Fresh, chilled or frozen	....do...	3.4	2.0	5.1	16.2	21.6
Canned & preserved	....do...	5.8	5.2	6.5	6.1	5.9
Total exports	....do...	123.4	79.3	112.0	207.2	224.6
Consumption:						
Total	....do...	3,050.8	3,151.6	3,226.1	3,042.1	2,742.1
Per capita	Pounds	57.8	59.0	60.1	56.2	50.4
Human population	1,000	52,816	53,341	53,678	54,066	54,425

[1] Provisional. [2] Estimated. [3] December of previous year. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

EASTERN EUROPE

POLAND

In Eastern Europe, Poland is the major beef producer after the Soviet Union. Production surpasses consumption even though beef imports are customary. Traditionally, Poland is a net exporter of dressed beef and live cattle -- mainly to European neighbors.

Per capita beef consumption in Poland -- as in all other East European countries, including the Soviet Union -- is below the average level of Western Europe. Yet, substantial quantities of beef and cattle move from Eastern Europe to Western Europe. Per capita consumption gains are, nevertheless, being registered in both areas. Reported advances in Poland are particularly significant -- from 23 pounds per person in 1961 to 32 pounds in 1964.

In recent years, cattle inventories, numbers slaughtered, beef production, exports and consumption have, reportedly, increased steadily. Apparently, adverse weather conditions characterizing most of Europe in 1962 and 1963 did not have similar repercussions in Poland.

Exports of live cattle and calves increased between 1961 and 1964 -- both in numbers and in the share of the total beef export equivalent; the meat equivalent of live animals amounted to about one-third of total exports in 1964.

Table 30.--POLAND: Cattle and Beef, production, foreign trade, and consumption, 1961-64

Item	Unit	1961	1962	1963	1964[1]
Live Cattle & Calves (numbers):					
On farms[3]	1,000 hd.	9,168	9,590	9,841	9,940
Imported[4]	....do...	0	0	0	0
Exported[4]	....do...	34	51	51	73
Slaughtered[5]	....do...	4,266	4,524	4,717	4,772
Beef & Veal (Carcass Wgt. Equiv.):					
Production[6]	Mil. lbs.	735.7	857.4	964.3	1,012.4
Domestic output (+):[7]					
From home-grown cattle	....do...	735.7	857.4	964.3	1,012.4
From exported live cattle	....do...	12.5	19.7	19.6	27.9
Gross domestic output	....do...	748.2	877.1	983.9	1,040.3
Imports (+):					
Live cattle & calves	....do...	0	0	0	0
Fresh, chilled or frozen	....do...	8.0	4.0	36.2	26.2
Canned & preserved	....do...	3.4	3.5	2.4	5.1
Total imports	....do...	11.4	7.5	38.6	31.3
Exports (-):					
Live cattle & calves	....do...	12.5	19.7	19.6	27.9
Fresh, chilled or frozen	....do...	49.5	69.8	43.4	37.1
Canned & preserved	....do...	13.5	14.2	16.1	16.6
Total exports	....do...	75.5	103.7	79.1	81.6
Consumption:					
Total	....do...	684.1	780.9	943.4	990.0
Per capita	Pounds	22.8	25.8	30.7	31.9
Human population	1,000	29,965	30,324	30,691	31,050

[1] Provisional. [2] Data for 1965 are not yet available. [3] June. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

YUGOSLAVIA

The largest exporter of cattle and beef in Eastern Europe, excluding the USSR, is Yugoslavia. Most of these exports move to countries in Western Europe -- primarily to Italy. Per capita consumption -- at around 14 pounds -- is among the lowest in Europe.

In 1964, cattle slaughter and beef production fell off around 15 percent from the high levels of the preceding two years when adverse weather, including drought, stimulated heavier-than-usual slaughter. Herd rebuilding was started in 1964 and continued in 1965. Despite substantially reduced availabilities in 1964, beef exports were only 2 percent below the previous year's alltime high. Exports of live cattle were off sharply, however, and continued at a much lower level in 1965.

The number of cattle on farms increased 2 percent during 1964 and an estimated further 3 percent during 1965.

Last year, cattle slaughter and beef production were moderately above 1964's reduced level while exports of dressed beef were off slightly.

Table 31.--YUGOSLAVIA: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	5,761	5,941	5,414	5,167	5,274
Imported[4]	....do...	0	0	0	1	0
Exported[4]	....do...	149	91	105	44	10
Slaughtered[5]	....do...	1,455	2,222	1,876	1,600	1,700
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	350.5	498.2	485.0	423.3	445.3
Domestic output (+):[7]						
From home-grown cattle	....do...	350.5	498.2	485.0	423.2	445.3
From exported live cattle	....do...	63.8	42.4	51.0	21.2	4.7
Gross domestic output	....do...	414.3	540.6	536.0	444.4	450.0
Imports (+):						
Live cattle & calves	....do...	0	0	0	.1	0
Fresh, chilled or frozen	....do...	0	0	2.2	.1	0
Canned & preserved	....do...	.1	.1	0	0	0
Total imports	....do...	.1	.1	2.2	.2	0
Exports (-):						
Live cattle & calves	....do...	63.8	42.4	51.0	21.2	4.7
Fresh, chilled or frozen	....do...	65.4	140.1	151.9	139.5	135.0
Canned & preserved	....do...	31.0	27.9	31.2	39.4	30.3
Total exports	....do...	160.2	210.4	234.1	200.1	170.0
Consumption:						
Total	....do...	254.1	330.2	301.9	244.4	280.0
Per capita	Pounds	13.7	17.5	15.8	12.7	14.4
Human population	1,000	18,607	18,841	19,065	19,290	19,495

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

USSR

The Soviet Union is the world's second largest producer of beef and veal -- following some distance behind the United States. Per capita consumption -- at roughly 30 pounds yearly -- is about the same as the average for Eastern Europe; the average in Western Europe is around 50 pounds and rising rapidly. The USSR is both a substantial exporter and a substantial importer of beef -- the net position depending on the current domestic supply situation.

In 1964, the Soviet Union was the world's tenth largest exporter and fifth largest importer of beef and veal in contrast to ranking fourth and ninth, respectively, in 1963. The bulk of Soviet beef exports move primarily to the Communist countries; the beef imports come from Yugoslavia, Poland, Uruguay, and in some years France, while imports of live cattle originate in Outer Mongolia.

Feed shortages in 1963 caused, in part, by adverse weather conditions, resulted in unusually heavy forced slaughter and high-level beef production. A large part of the increase in domestic supplies moved into foreign trade; Soviet beef exports hit an alltime high in 1963. Domestic per capita consumption changed little from the previous year.

In 1964, output increased further, imports rose, and exports fell off sharply with the result that per capita consumption advanced to 30 pounds -- up 2 pounds over the previous two years.

Table 32.--USSR: Cattle and Beef, production, foreign trade, and consumption, 1961-65

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	75,800	82,100	87,000	85,400	
Imported[4]	....do...	138	136	88	91	
Exported[4]	....do...	0	0	0	0	
Slaughtered	....do...	([5])	([5])	([5])	([5])	
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	5,434.3	6,183.9	6,675.5	6,746.1	
Domestic output (+):[7]						
From home-grown cattle	....do...	5,389.4	6,140.7	6,646.4	6,716.1	
From exported live cattle	....do...	0	0	0	0	
Gross domestic output	....do...	5,389.4	6,140.7	6,646.4	6,716.1	
Imports (+):						
Live cattle & calves	....do...	44.9	43.2	29.1	30.0	
Fresh, chilled or frozen	....do...	94.6	303.4	45.9	161.4	
Canned & preserved	....do...	20.5	39.6	13.6	50.8	
Total imports	....do...	160.0	306.2	88.6	242.2	
Exports (-):						
Live cattle & calves	....do...	0	0	0	0	
Fresh, chilled or frozen	....do...	132.7	232.8	319.7	115.5	
Canned & preserved	....do...	14.7	64.2	91.5	22.5	
Total exports	....do...	147.4	297.0	411.2	138.0	
Consumption:						
Total	....do...	5,402.0	6,229.9	6,323.8	6,820.3	
Per capita	Pounds	24.8	28.1	28.1	29.9	
Human population	1,000	218,000	221,465	224,764	228,318	

[1] Provisional. [2] Data for 1965 are not yet available. [3] January. [4] Excluding cattle for breeding. [5] Not available. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

OCEANIA

AUSTRALIA

Since the early 1950's, Australia has maintained its solid second-ranking position after Argentina among the world's leading exporters of beef and veal. In 1964, exports were 8 percent larger than in the previous year. Also, in fiscal year 1964-65, total beef and veal exports were double the quantity shipped in 1960-61. A steady uptrend has been evident.

Beef and veal production during fiscal year 1964-65 was 59 percent larger than in 1960-61. In line with government policy, output has grown steadily in recent years. So, too, have exports.

Before 1959, the United Kingdom purchased the bulk of Australia's beef shipments. That year, however, exports to the United States surged upward. Since 1960, the United States has been Australia's largest single market for manufacturing-type beef.

In 1964, another significant shift occurred. Substantial quantities of Australian beef were diverted from the United States to Western European markets. Attractive prices there were caused by increased demand, reduced domestic supplies and Argentina's inability to satisfy existing import requirements. Increased shipments to Western Europe continued in 1965. Exports to the United States were off significantly from 1964.

Table 33.--AUSTRALIA: Cattle and Beef, production, foreign trade and consumption, 1961-65 year ending June 30

Item	Unit	1961	1962	1964	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	17,332	18,033	18,549	19,004	18,200
Imported[4]	....do...	0	0	0	0	0
Exported[4]	....do...	10	7	9	8	8
Slaughtered[5]	....do...	4,278	5,115	5,931	6,438	6,828
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	1,417.0	1,772.0	2,047.0	2,208.0	2,255.8
Domestic output (+):[7]						
From home-grown cattle	....do...	1,417.0	1,772.0	2,047.0	2,208.0	2,255.8
From exported live cattle	....do...	3.4	2.4	3.0	2.5	2.5
Gross domestic output	....do...	1,420.4	1,774.4	2,050.0	2,210.5	2,258.3
Imports (+):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total imports	....do...	0	0	0	0	0
Exports (-):						
Live cattle & calves	....do...	3.4	2.4	3.0	2.5	2.5
Fresh, chilled or frozen	....do...	449.7	663.3	860.8	933.0	982.2
Canned & preserved	....do...	79.6	93.6	71.7	76.5	78.6
Total exports	....do...	532.7	759.3	935.5	1,012.0	1,063.3
Consumption:						
Total	....do...	887.7	1,015.1	1,114.5	1,198.5	1,195.0
Per capita	Pounds	84.5	94.8	101.1	107.7	104.8
Human population	1,000	10,604	10,810	11,023	11,251	11,400

[1] Provisional. [2] Estimated. [3] March. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

Eastern Australia -- major cattle producing region -- suffered from serious drought throughout 1965. Severe shortages of stock water and pasture grasses caused death losses and forced livestock marketings. Despite a 6 percent increase in slaughterings in 1965, beef output rose only 2 percent because of lighter slaughter weights. As the drought breaks, it is likely that slaughterings will be reduced in an effort to rebuild breeding herds.

Most exported Australian beef is in the form of fresh, chilled or frozen boneless. In 1965, bone-in beef became somewhat more important than previously. That which is shipped to the United States is chiefly boneless manufacturing-type beef destined for further processing.

NEW ZEALAND

New Zealand has been the world's third largest exporter of beef and veal since the 1950's. The bulk of these exports are in the form of fresh, chilled or frozen boneless manufacturing-type beef. The United States has been New Zealand's principal outlet since the late 1950's. Exports to the United States reached a peak in 1963. The following year they fell off sharply. A further decline in exports to the United States was noted in 1965. Beginning in 1964, relatively more New Zealand beef was diverted from the United States to the United Kingdom and other Western European markets. Price differentials influenced the shift.

Dramatic potential expansion of New Zealand's cattle industry has not been realized, largely because sheep have continued to be a generally more profitable venture. With domestic per capita beef consumption already at a high level, further production increases would probably flow into the world export market.

Beef and veal production in 1965 was roughly 6 percent lower than in the preceding year. Reduced cow slaughterings and lighter weights are reflected. Output during 1966 is expected to increase to 1962-64 levels, as a result of heavier slaughterings of cull cows.

Reduced 1965 beef output resulted in 14 percent less beef exports than in 1964. Slight increases are indicated for 1966.

Table 34.--NEW ZEALAND: Cattle and Beef, production, foreign trade, and consumption, 1961-65, year ending September 30

Item	Unit	1961	1962	1963	1964[1]	1965[2]
Live Cattle & Calves (numbers):						
On farms[3]	1,000 hd.	6,446	6,598	6,691	6,696	6,888
Imported[4]	....do...	0	0	0	0	0
Exported[4]	....do...	0	0	0	0	0
Slaughtered[5]	....do...	2,294	2,649	2,694	2,678	2,370
Beef & Veal (Carcass Wgt. Equiv.):						
Production[6]	Mil. lbs.	554.8	643.1	642.8	644.9	607.9
Domestic output (+):[7]						
From home-grown cattle	....do...	554.8	643.1	642.8	644.9	607.9
From exported live cattle	....do...	0	0	0	0	0
Gross domestic output	....do...	554.8	643.1	642.8	644.9	607.9
Imports (+):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	0	0	0	0	0
Canned & preserved	....do...	0	0	0	0	0
Total imports	....do...	0	0	0	0	0
Exports (-):						
Live cattle & calves	....do...	0	0	0	0	0
Fresh, chilled or frozen	....do...	284.5	323.3	387.6	365.5	313.6
Canned & preserved	....do...	8.3	8.6	12.5	7.5	6.7
Total exports	....do...	292.8	331.9	400.1	373.0	320.3
Consumption:						
Total	....do...	262.0	311.2	242.7	271.9	287.4
Per capita	Pounds	106.4	123.4	94.3	103.5	108.9
Human population	1,000	2,463	2,521	2,575	2,627	2,640

[1] Provisional. [2] Estimated. [3] January. [4] Excluding cattle for breeding. [5] Total of home-grown and imported, farm and commercial. [6] From total slaughter of both home-grown and imported cattle and calves; excludes offals, and exported live animals. [7] Excluding meat equivalent of imported live animals.

UNITED STATES DEPARTMENT OF AGRICULTURE

50 WASHINGTON, D. C. 20250

POSTAGE AND FEES PAID
U. S. DEPARTMENT OF AGRICULTURE

Official Business

NOTICE

If you no longer need this publication, check here ☐ return this sheet, and your name will be dropped from the mailing list.

If your address should be changed, print or type the new address on this sheet and return the whole sheet to:

Foreign Agricultural Service, Rm. 5918
U.S. Department of Agriculture,
Washington, D.C. 20250.